# REZSTREAM PROFESSIONAL BOOKING ENGINE USER'S GUIDE

*February 8, 2007*

# TABLE OF CONTENTS

**CONTACT US** ..... **2**

**OVERVIEW OF THE REZSTREAM BOOKING ENGINE** ..... **2**

**INTRODUCTION** ..... **2**

**HOW TO EFFECTIVELY USE THIS SETUP GUIDE** ..... **2**

REZSTREAM BOOKING ENGINE TERMS ..... 2

**1. PREPARE TO UPLOAD REZSTREAM PROFESSIONAL DATA** ..... **2**

BUSINESS DATA ..... 2
RATE PLANS, RATE NAMES, AND RATE SEASONS ..... 2
Rate Plans ..... 2
Rate Names ..... 2
Rate Seasons ..... 2
UNIT LONG NAMES AND STANDARD DESCRIPTIONS ..... 2
Unit Long Name ..... 2
Standard Description ..... 2
RATE PLAN LONG DESCRIPTIONS ..... 2
INDIVIDUAL TAXES AND TAX CLASS GROUPINGS ..... 2
Individual Taxes ..... 2
Tax Class Groupings ..... 2
POINT OF SALE ITEMS ..... 2
PACKAGES ..... 2
Note about Package Fields ..... 2
LETTERS ..... 2
REASONS FOR RESERVATION ..... 2
REFERRAL SOURCES ..... 2

**2. UPLOAD REZSTREAM PROFESSIONAL DATA** ..... **2**

AUTO UPDATE ..... 2
UPLOADING REZSTREAM PROFESSIONAL CHANGES ..... 2
Note Regarding Confirmation Letters ..... 2

**3. ACCESS THE ONLINE ADMINISTRATIVE INTERFACE** ..... **2**

SYSTEM REQUIREMENTS ..... 2
Screen Resolution ..... 2
Internet Explorer Version ..... 2
JavaScript ..... 2
Cookies ..... 2
Internet Connection ..... 2
CHANGING THE DEFAULT REZSTREAM BOOKING ENGINE PASSWORD ..... 2
THE REZSTREAM BOOKING ENGINE ONLINE ADMINISTRATIVE INTERFACE HOME PAGE ..... 2
ENTERING INFORMATION IN THE REZSTREAM BOOKING ENGINE ..... 2
Common Forms ..... 2
Common Icons ..... 2

**4. ORGANIZE BOOKING ENGINE SPECIFIC INFORMATION ..... 2**

ACCOUNT SETUP ..... 2
Account Information > Details ..... 2
Account Information > Users ..... 2
Account Information > Photos/Images/Media (Optional) ..... 2
Account Information > Amenities (Optional) ..... 2
User Defined Fields (Optional) ..... 2
PROPERTY SETUP ..... 2
Property Information > Property Details ..... 2
Property Information > Finance Settings ..... 2
Property Information > Terms/Conditions (Optional) ..... 2
Property Information > Restrictions (Optional) ..... 2
Letters ..... 2
Booking Engine Settings ..... 2
Units/Rooms > Black-out Wizard (Optional) ..... 2
Website Link Options ..... 2

**5. COMPLETE ACCOUNT SETUP ..... 2**

ACCOUNT INFORMATION ..... 2
Details ..... 2
Users ..... 2
Creating New Users ..... 2
Edit an Existing User's Profile ..... 2
Delete an Existing User ..... 2
Photos/Images/Media (Optional) ..... 2
Edit an Existing Photo ..... 2
Delete an Existing Photo ..... 2
View Existing Photos ..... 2
Amenities (Optional) ..... 2
Add a New Amenity ..... 2
Edit an Existing Amenity ..... 2
Delete an Existing Amenity ..... 2
View Existing Amenities ..... 2
Sources ..... 2
Reasons ..... 2
TAXES ..... 2
Individual Taxes ..... 2
Tax Groups (Tax Class Groupings) ..... 2
POINT OF SALE (OPTIONAL) ..... 2
PACKAGES (OPTIONAL) ..... 2
RATE PLANS/UNIT TYPES ..... 2
RATE NAMES/RATE SEASONS ..... 2
REPORTS ..... 2
STATISTICS/TRACKING ..... 2
USER DEFINED FIELDS ..... 2

**6. COMPLETE PROPERTY SETUP ..... 2**

PROPERTY INFORMATION ..... 2
Property Details ..... 2
Finance Settings ..... 2
Add/Edit Finance Settings ..... 2
Terms/Conditions ..... 2
Restrictions ..... 2
Photos/Images/Media ..... 2
Amenities ..... 2
Assign a Property Level Amenity ..... 2
LETTERS ..... 2
BOOKING ENGINE SETTINGS ..... 2
Guest Payment Settings ..... 2
When Customer Payment is Rejected ..... 2
Accepted Forms of Payment ..... 2
Online Booking Deposits Setup ..... 2
Design Header ..... 2
Design Footer ..... 2
Reservation Defaults ..... 2
When No Availability is Returned ..... 2
Online Booking Defaults ..... 2
Max. Time in the Future to Accept Reservations ..... 2
Min. Time from current date to Accept Reservations ..... 2
Sources/Reasons ..... 2
Guest-View Invoice Format ..... 2
Guest Tracking ..... 2
RezStream Tracker Settings ..... 2
Style Reservation Pages ..... 2
Reservation Behavior ..... 2
Availability Options ..... 2
Guest Rate Selection ..... 2
Make the Following Types of 'Bookable' Items Available Online ..... 2
Date Format ..... 2
View Currency In ..... 2
Property Management/Owner Options ..... 2
UNITS/ROOMS ..... 2
Administration ..... 2
Unit Details ..... 2
Amenities ..... 2
Photos ..... 2
Availability ..... 2
Black-Out Wizard ..... 2
AMENITY SEARCHABILITY ..... 2
Property ..... 2
Unit/Room ..... 2
WEBSITE LINK OPTIONS ..... 2

WEBSITE AVAILABILITY CALENDARS ..... 2
Design Customizable Calendar ..... 2
Design My Own ..... 2
Forest Green – Checkmark if Available ..... 2
Guest Tracker Default Calendar ..... 2
Professional – Red & Green Squares ..... 2
Retrieve Calendar Links ..... 2
Availability Examples ..... 2
**ADMINISTRATIVE RESERVATIONS ..... 2**
**REZSTREAM CONTACT INFORMATION ..... 2**
**REZSTREAM ADDITIONAL REFERENCES ..... 2**

# CONTACT US

**RezStream Booking Engine Help Desk: (303) 872-0220**

Support Hours: 8:00AM – 5:00PM, Monday through Friday, MST.

# OVERVIEW OF THE REZSTREAM BOOKING ENGINE

The RezStream Booking Engine is a web based program that integrates your property's website and other Internet reservation sites allowing potential guests the ability to book confirmed online reservations. The RezStream Booking Engine can receive online reservations 24 hours a day, 365 days a year! The RezStream Booking Engine also provides high-level customization and flexibility.

Key features in the RezStream Booking Engine include:

- Direct bank deposits: Payment for bookings made from your website is electronically deposited directly into your bank account within a few business days.
- Ease of use: The RezStream Booking Engine can be accessed via the Internet using a user ID and password. Coupled with RezStream's industry-leading property management software, RezStream Professional, integration is seamless.
- Customize your level of service: Choose RezStream Booking Engine products and services that make sense for your business, from a simple availability calendar to distribution to all the major travel websites like Expedia and Travelocity.
- Flexible: All property information, policies, unit rates, minimum night stay requirements, 'blackout' dates, and items unique to your property are completely customizable.

# INTRODUCTION

To begin using the RezStream Booking Engine with RezStream Professional, you must first establish a RezStream Booking Engine account by calling 866-360-8210. Once you have been approved for a RezStream Booking Engine account, you may then call RezStream support at 303-872-0220 to begin the actual setup process.

The first step of the RezStream Booking Engine Setup process is to prepare the RezStream Professional database to be uploaded to the RezStream Booking Engine. This step involves double-checking rate plans, rate names, rate seasons, unit names, unit descriptions, point of sale items, packages, individual taxes, and tax class groupings. Consult the following section, ***Prepare to Upload RezStream Professional Data***, for details.

Many settings from RezStream Professional are automatically uploaded to the RezStream Booking Engine. Once your information is uploaded to the RezStream Booking Engine, you must then finish the setup process by completing additional online steps described in this document. Once the setup is complete, the final step in taking your RezStream Booking Engine "live" involves placing a link to the RezStream Booking Engine on your website. You are then ready to receive online reservations 24 hours a day without any human interaction needed.

The following list summarizes the steps required for taking your RezStream Booking Engine live.

1. Prepare to upload RezStream Professional data.
2. Upload RezStream Professional data to the RezStream Booking Engine.
3. Access the RezStream Booking Engine Online Administrative Interface.
4. Organize information used to define RezStream Booking Engine settings.
5. Complete the RezStream Booking Engine Account setup menu.
6. Complete the RezStream Booking Engine Property setup menu.

# HOW TO EFFECTIVELY USE THIS SETUP GUIDE

The information contained in this document is organized in a manner that allows a property owner or designated user(s) to configure and effectively use the RezStream Booking Engine in conjunction with RezStream Professional. The goal of this document is to successfully guide you through the process of entering information required for activating your RezStream Booking Engine so you may begin generating incremental revenue for your property.

***Any text that follows the information icon denotes a tip or information of importance. Please read these notes carefully!***

***Also, any text that appears in bold and italics stresses a specific step in the RezStream Booking Engine configuration process. Please note these important steps.***

Prior to beginning RezStream Booking Engine setup, familiarize yourself with the following table of RezStream Booking Engine terms.

## REZSTREAM BOOKING ENGINE TERMS

| TERM | DEFINITION |
|---|---|
| RezStream | A property management software company that also provides real-time Internet reservation solutions. |
| Property | Refers to any business that uses the RezStream Booking Engine or other RezStream products. |
| Users | Owners or assigned employees of the designated property who use the RezStream Booking Engine or other RezStream products. |
| RezStream Professional | RezStream's property management software (PMS) that is installed on the property's local computer(s) and is used to comprehensively manage a property's phone reservations and complete guest management needs. RezStream Professional also has the capability to communicate 'two-way' with the RezStream Booking Engine to fully automate local property reservations with RezStream Booking Engine online reservations. |
| Two-Way Communication | RezStream Professional automatically sends unit availability and rate information to the RezStream Booking Engine. The RezStream Booking Engine automatically transfers real-time Internet reservations directly into RezStream Professional without manual data input. |
| RezStream Booking Engine | RezStream's web based program for receiving online reservations from guests via the Internet. Reservations may come from a variety of Internet reservation sources like Expedia, Travelocity, travel agents, and your own property's website. |
| Standalone User | Refers to RezStream customers who use the RezStream Booking Engine without also using RezStream Professional. Standalone users utilize a user name and password to access the RezStream Booking Engine via the Internet, to update availability, and receive online reservations. Examples of standalone users would be Macintosh users or properties with basic Internet reservation needs that do not use RezStream Professional. |

| TERM | DEFINITION |
|---|---|
| Real-Time Reservation | A potential customer fills out a reservation form on a property's website or other Internet reservation site (example: Expedia) receiving an instant email confirmation with a confirmation number. The RezStream Booking Engine can process real-time reservations and automatically process credit card deposits for individual website bookings. Once a real-time reservation has been made, the property is also notified of the confirmed reservation immediately via email. If a property uses RezStream Professional, the reservation will be automatically entered into the property management software system. |
| Online Administrative Interface | A series of web pages where RezStream Booking Engine customers enter property data or manage online availability. |
| Expandable List | Found within the RezStream Booking Engine Online Administrative Interface categories. Placing your cursor on one topic opens a more detailed list of related sub-menu items. |
| Tree Menu | Sub-menus with plus signs (+) and minus signs (-) next to the item name that users left click to 'expand' the item to see more information. The RezStream Booking Engine uses tree menus to display the maximum amount of related information at one time. |
| Form | An individual web page within the Online Administrative Interface for entering information. |
| System Administrator or Designated User | The person responsible for setting up the RezStream Booking Engine and managing different user level permissions. |
| Availability Calendars | Display unit availability and property information in graphical form on a website. The RezStream Booking Engine uses calendars to display unit availability. |
| Point of Sale (POS) | Miscellaneous items offered for sale at the property like tee shirts, robes, and champagne. The RezStream Booking Engine allows users to sell POS items online. |
| Packages | A specific collection of Point of Sale items. A Romance Package might include roses, champagne, and dinner for two. The RezStream Booking Engine allows users to sell optional packages online. |
| Global Distribution System (GDS) | Allows individual property information and rates to be available to hundreds of thousands of travel agents worldwide. RezStream Booking Engine customers can elect to participate on the GDS. |
| Onward Distribution System (ODS) | Allows individual property information and rates to be available on well-known travel sites such as Expedia, Travelocity, and Orbitz. RezStream Booking Engine customers can elect to participate on the ODS. |

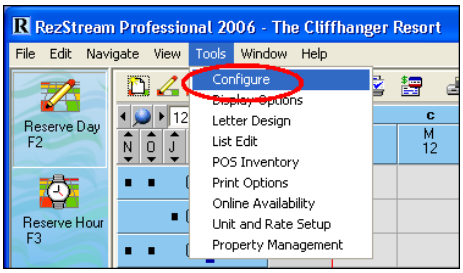
# 1. PREPARE TO UPLOAD REZSTREAM PROFESSIONAL DATA

In order to upload data from RezStream Professional to the RezStream Booking Engine, you must be running RezStream Professional version 2007.1.3 or higher. To confirm your RezStream Professional version, login to RezStream Professional and click Help > About on the top toolbar.

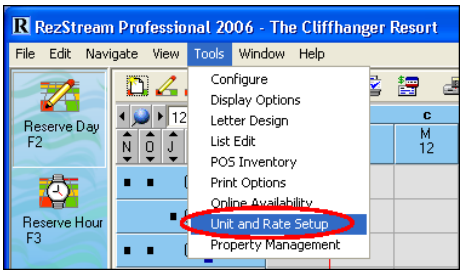
Prior to uploading any data from RezStream Professional to the RezStream Booking Engine, confirm that the following settings contain current information and that they are formatted in the recommended manner.

1. Business Data
2. Rate Plans, Rate Names, and Rate Seasons
3. Unit Long Names and Standard Descriptions
4. Rate Plan Long Descriptions
5. Individual Taxes and Tax Class Groupings
6. Point of Sale Items
7. Packages
8. Letters
9. Reasons for Reservation
10. Referral Sources

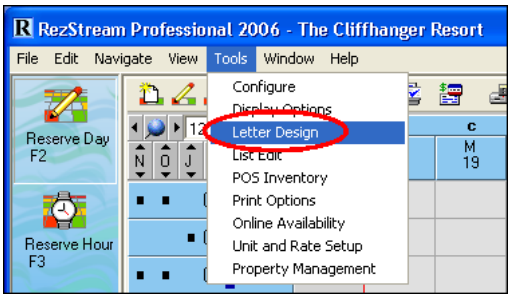
Step 1, Business Data, is accessed in RezStream Professional by clicking Tools > Configure.



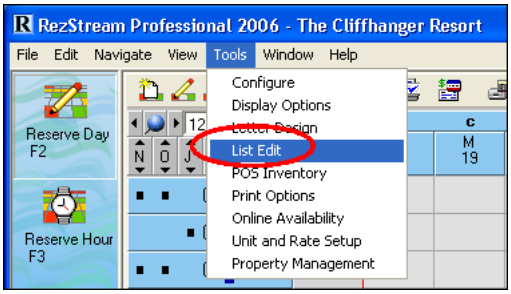

Steps 2 – 7, Rate Plans, Rate Names, and Rate Seasons through Packages, are accessed in RezStream Professional by clicking Tools > Unit and Rate Setup.



Step 8, Letters, is accessed in RezStream Professional by clicking Tools > Letter Design.

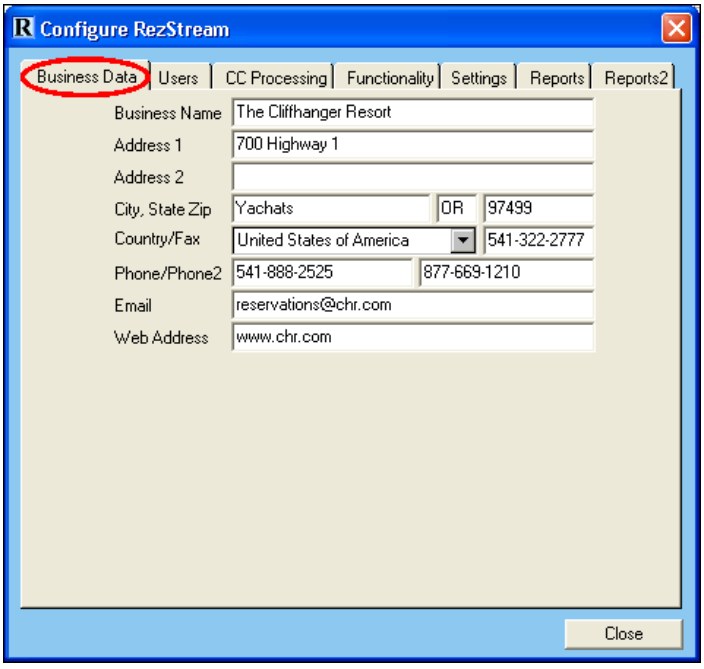



Steps 9 and 10, Reasons for Reservation and Referral Sources, are accessed in RezStream Professional by clicking Tools > List Edit.



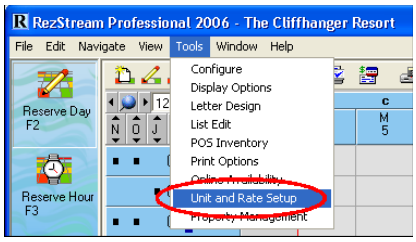

# BUSINESS DATA

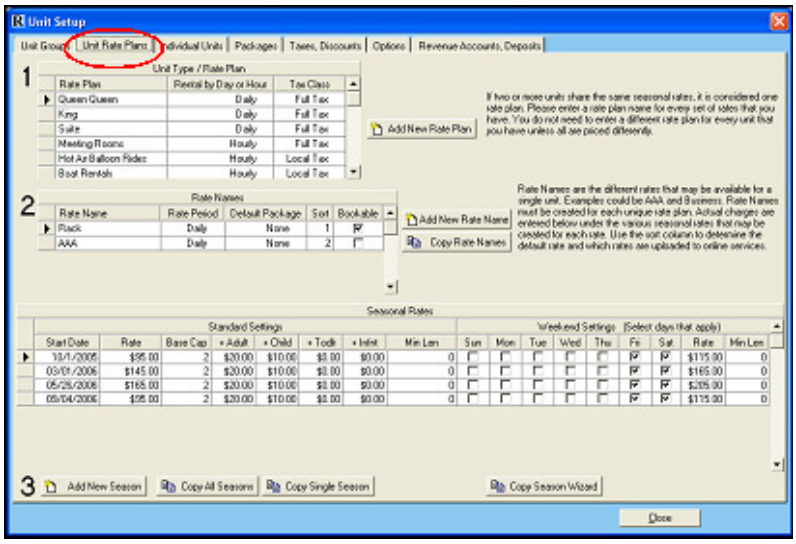
From RezStream Professional, click Tools > Configure and select the Business Data tab to verify that the basic property contact information listed is correct.



# RATE PLANS, RATE NAMES, AND RATE SEASONS

From RezStream Professional, click Tools > Unit and Rate Setup and select the Unit Rate Plans tab to verify that Rate Plans, Rate Names, and Rate Seasons are configured correctly for the RezStream Booking Engine.

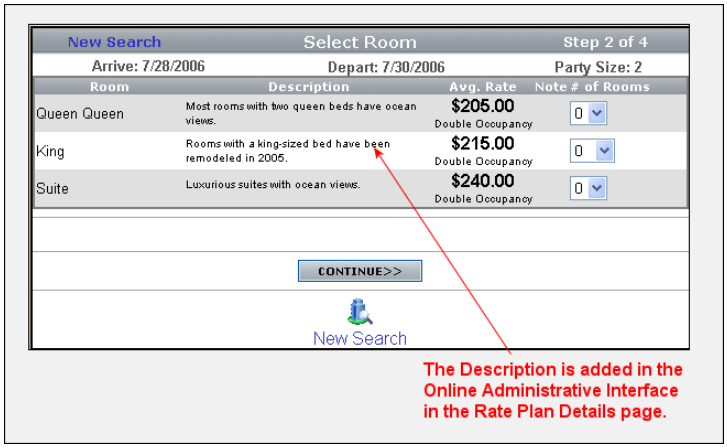


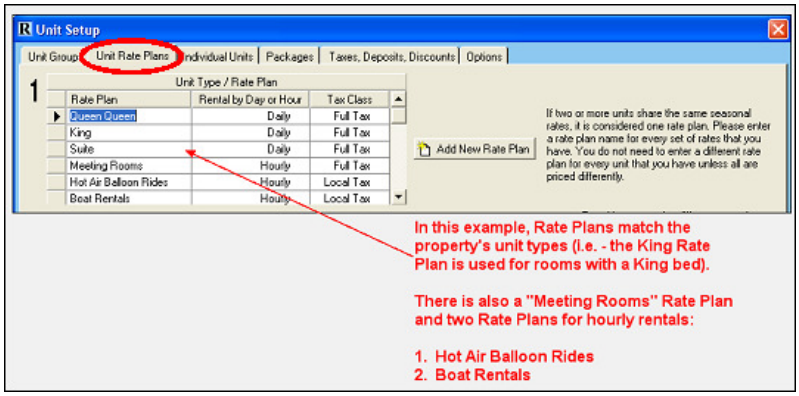

## RATE PLANS

The RezStream Booking Engine can be configured to allow Internet guests to make reservations for a room type, without selecting a specific room. For example, an Internet guest may book a reservation for a "King" room. In this guide, this type of reservation will be referred to as an **Inventory** reservation.

If your property intends to allow Inventory reservations, rate plans should describe room types. In addition, the name of each rate plan should be clear and concise, allowing the Internet guest to easily recognize the type of accommodation being booked. Rate plan names are viewed by Internet guests booking reservations via the RezStream Booking Engine. In the example below, an Internet guest has already entered arrival and departure dates in the RezStream Booking Engine. Next, available rate plans are displayed – Queen Queen, King, and Suite.



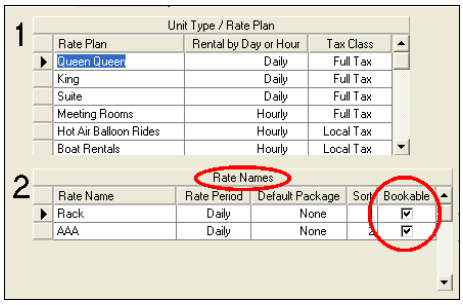
The rate plans displayed in the RezStream Booking Engine are defined in RezStream Professional by clicking Tools > Unit and Rate Setup and selecting the Unit Rate Plans tab.


Unit Setup
Unit Groups
Unit Rate Plans
Individual Units
Packages
Taxes, Deposits, Discounts
Options
1
Unit Type / Rate Plan
Rate Plan
Rental by Day or Hour
Tax Class
Queen Queen
Daily
Full Tax
King
Daily
Full Tax
Suite
Daily
Full Tax
Meeting Rooms
Hourly
Full Tax
Hot Air Balloon Rides
Hourly
Local Tax
Boat Rentals
Hourly
Local Tax
Add New Rate Plan
If two or more units share the same seasonal rates, it is considered one rate plan. Please enter a rate plan name for every set of rates that you have. You do not need to enter a different rate plan for every unit that you have unless all are priced differently.
In this example, Rate Plans match the property's unit types (i.e. - the King Rate Plan is used for rooms with a King bed).
There is also a "Meeting Rooms" Rate Plan and two Rate Plans for hourly rentals:
1. Hot Air Balloon Rides
2. Boat Rentals

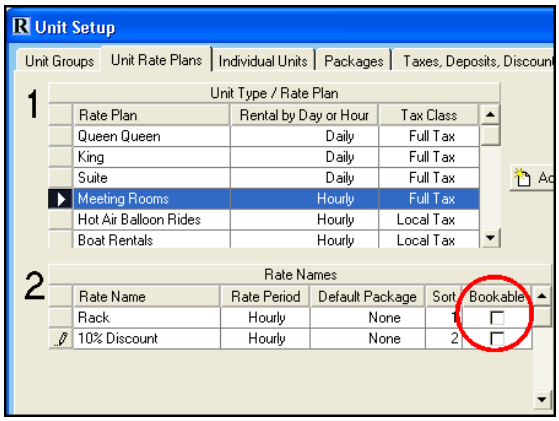
With descriptive rate plans set up in RezStream Professional, an Internet guest making a reservation via the RezStream Booking Engine will be able to easily identify the types of accommodations available at your property.

## RATE NAMES

The rate names section of the Unit Rate Plans tab contains a "Bookable" checkbox. This checkbox determines whether or not the rate names (Rack and AAA) will be available in the RezStream Booking Engine. Click the Bookable checkbox for all rate names that will be available to potential online guests. In the example below, the Rack and AAA rate names for the Queen Queen rate plan will be bookable on the RezStream Booking Engine.

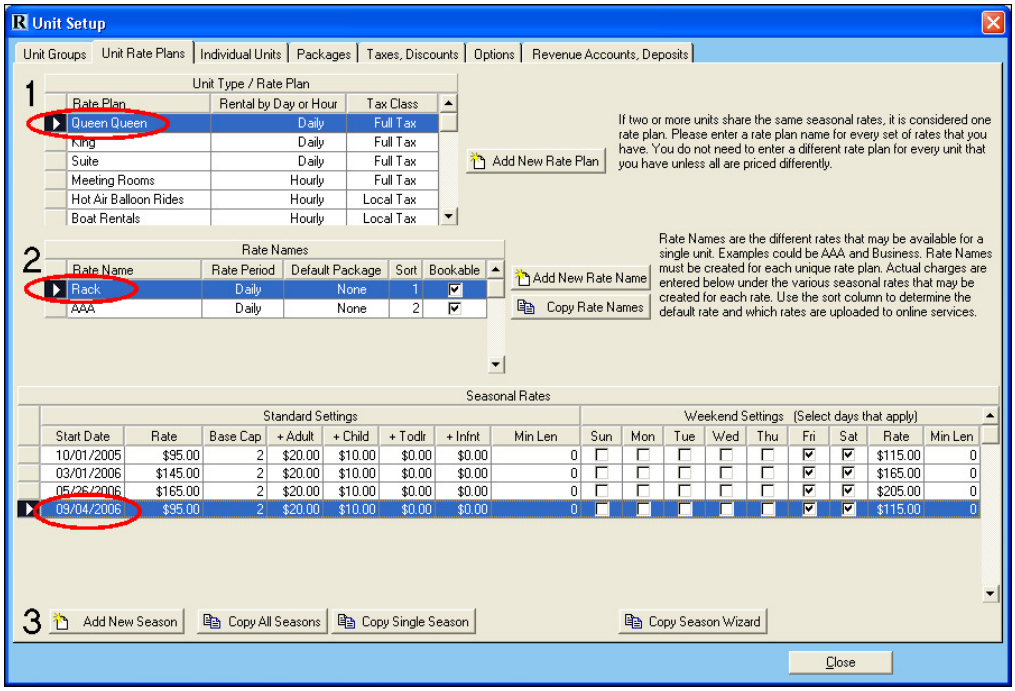



However, assume the property is not currently allowing Internet guests to book meeting rooms via the RezStream Booking Engine. For these rate plans, the Bookable checkbox will be left blank in the Rate Names table (see example below).



# RATE SEASONS

Most properties will configure the RezStream Booking Engine to accept reservations up to one year in the future. It is imperative that rates are also defined for that same time period. In the example below, the Rack rate name for the Queen Queen rate plan has been defined in RezStream Professional through 09/04/2006, accounting for seasonal rate fluctuations.




With the above rate seasons defined, an Internet guest making a reservation through the RezStream Booking Engine for 09/05/06 – 9/08/06 would be charged $95/night on weekdays and $115/night on weekends.

Now, let's take a look at the Seasonal Rates table for the same property's AAA rate name for the King rate plan (unit type).

| Standard Settings | | | | | | | | Weekend Settings (Select days that apply) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Start Date | Rate | Base Cap | + Adult | + Child | + Todlr | + Infnt | Min Len | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Rate | Min Len |
| 11/15/1999 | $75.00 | 2 | $10.00 | $5.00 | $0.00 | $0.00 | 0 | ☑ | ☐ | ☐ | ☐ | ☐ | ☑ | ☑ | $85.00 | 0 |

In the sample table displayed above, the property has **never** taken the time to update rate seasons for the AAA rate. It is highly likely that reservationists at the property just override the AAA rate and manually assign a dollar amount for the nightly charge. ***While this method works for RezStream Professional, it WILL NOT WORK for the RezStream Booking Engine.*** In this example, all guests selecting the AAA rate name for a King rate plan/unit type will be charged $75/night during the week and $85/night on weekends. In this scenario, the property stands to lose a considerable amount of revenue!

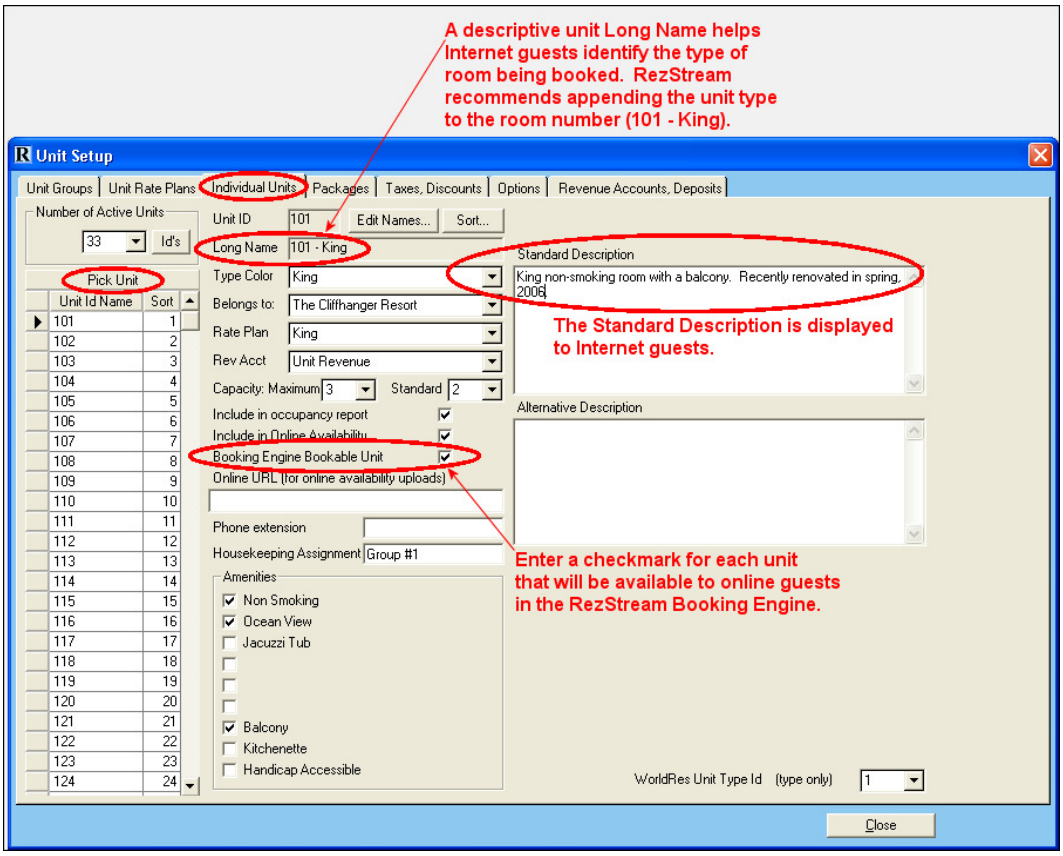
***Do NOT upload your RezStream Professional settings to the RezStream Booking Engine until each rate season is reviewed and correctly defined for one year in advance.***

# UNIT LONG NAMES AND STANDARD DESCRIPTIONS

From the top toolbar in RezStream Professional, click Tools > Unit and Rate Setup and then select the Individual Units tab. From the Pick Unit list, highlight each unit that will be available to online guests and verify that the unit long name and standard description has been configured correctly for the RezStream Booking Engine.

Both the unit long name and standard description are critical for companies that configure the RezStream Booking Engine to accept online reservations for individual units. A descriptive unit long name helps the Internet guest easily identify the room type being booked. RezStream recommends appending the unit type to the room number, for example, 101 – King.

The RezStream Booking Engine displays each room's standard description when displaying available rooms. If a room does not have a standard description, the RezStream Booking Engine's "Select Room" page will appear incomplete.



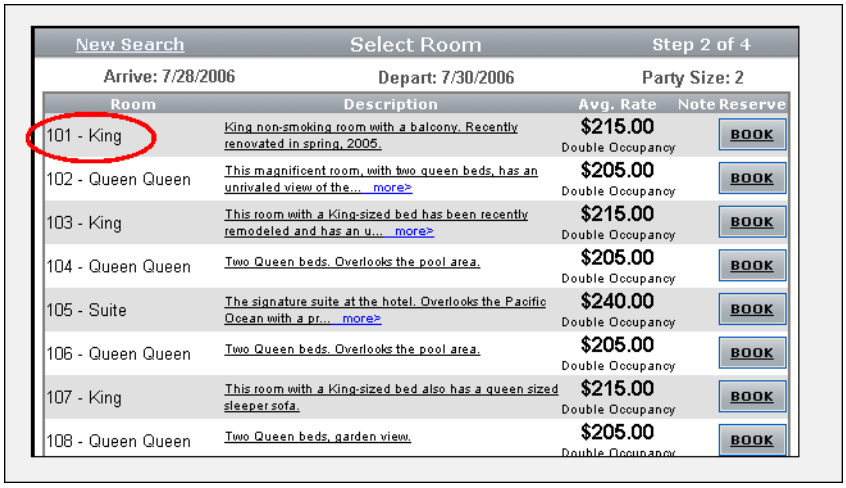

***In order for a specific room to be available to online guests via the RezStream Booking Engine, a checkmark must be added to the "Booking Engine Bookable Unit" field.***

***Do not proceed with the steps in "Section 2. Upload RezStream Professional Data" until you have verified each unit long name and entered a standard description for each unit.***

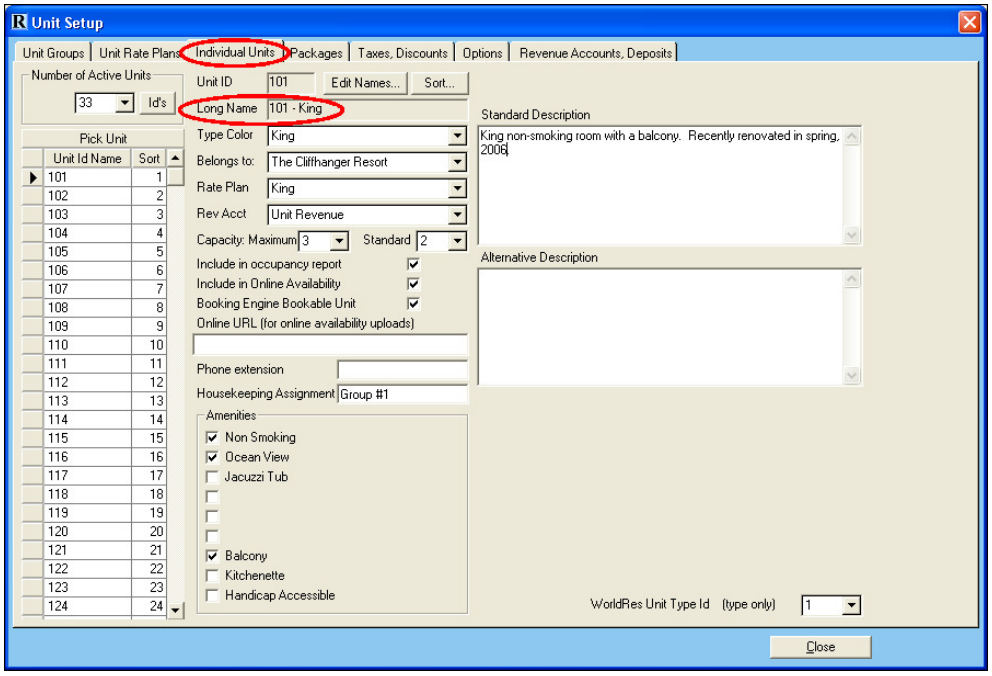
# UNIT LONG NAME

Many properties configure the RezStream Booking Engine to assign a room when a guest makes a reservation via the RezStream Booking Engine. This guide refers to this type of reservation as a **Pre-Assign** reservation.

With the RezStream Booking Engine configured to make Pre-Assign reservations, the Internet guest enters arrival and departure dates and then views a list of available rooms. This list of available rooms displays the unit long name.

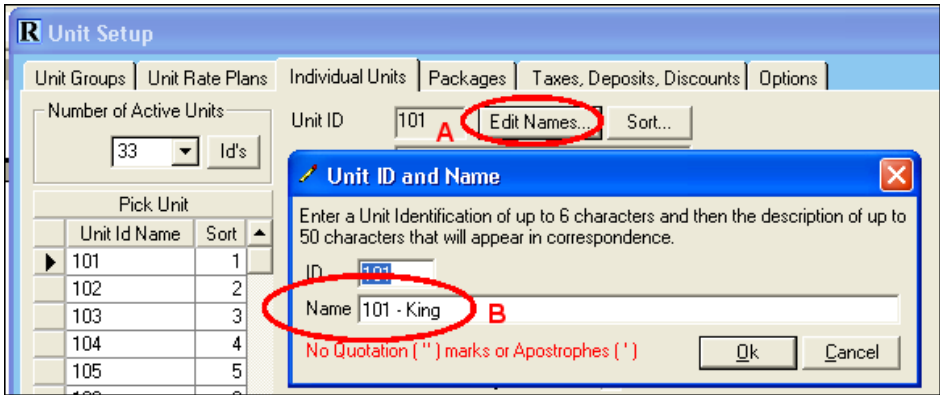



The unit long name is assigned in RezStream Professional by clicking Tools > Unit and Rate Setup > Individual Units and entering a description in the Long Name field.



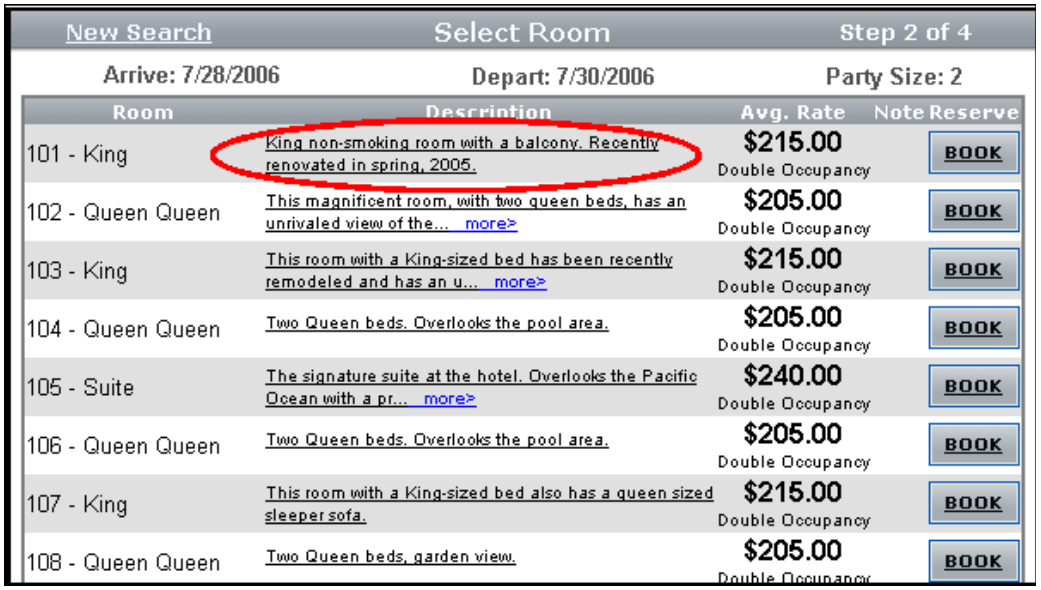

***In order to make it easy for the Internet guest to know what type of room they are booking, RezStream recommends appending the unit type onto the room number. For example, 101 – King, where King is the unit type.***

To edit the unit long name, click the Edit Names button. In the example below, room 101 is being changed to 101 - King.

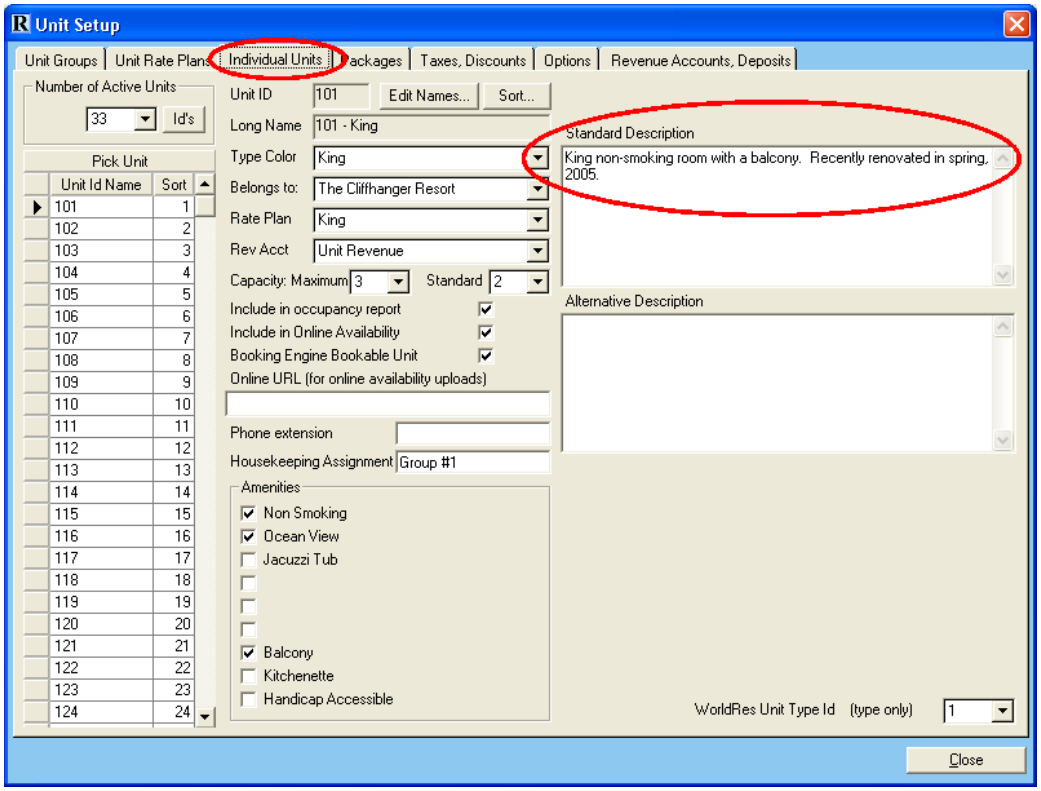



## STANDARD DESCRIPTION

When the RezStream Booking Engine is configured to make Pre-Assign reservations, the Internet guest enters arrival and departure dates and then views a list of available rooms. This available rooms list displays the unit standard description.



The standard description is added in RezStream Professional by clicking Tools > Unit and Rate Setup > Individual Units. Enter a detailed text description in the Standard Description field.

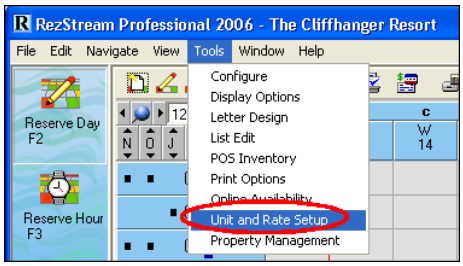



***For properties that configure the RezStream Booking Engine to make Pre-Assign reservations, RezStream recommends entering a standard description for each unit prior to uploading any data to the RezStream Booking Engine.***

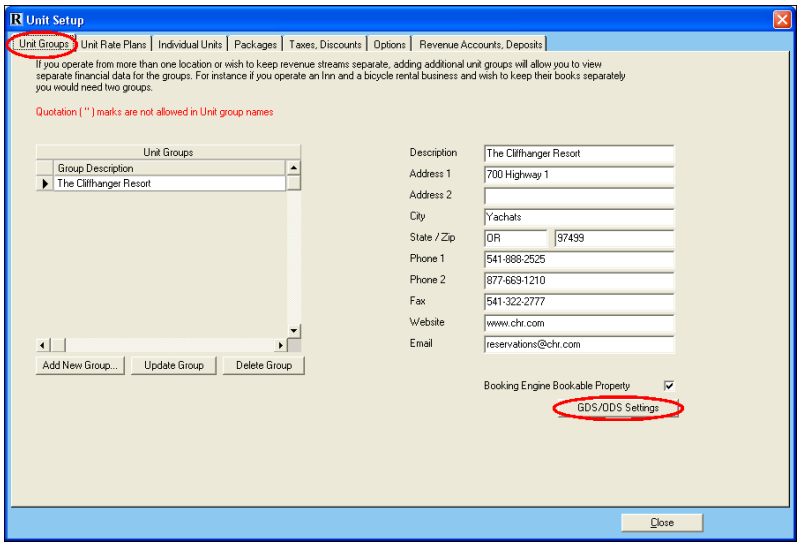
# RATE PLAN LONG DESCRIPTIONS

The RezStream Booking Engine can be configured to make reservations for unit types or specific rooms. With the RezStream Booking Engine configured to make reservations for unit types/rate plans, a long description can be added to each unit type/rate plan in RezStream Professional and then transferred to the RezStream Booking Engine. The long description provides additional information about the type of accommodation being reserved. Use the following steps to add a rate plan long description.

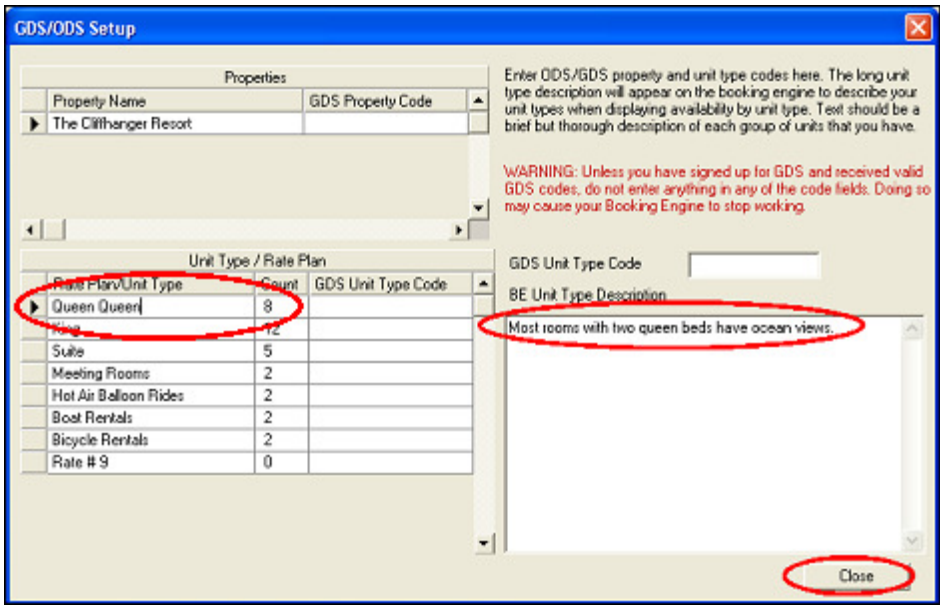
1. From RezStream Professional, click Tools > Unit and Rate Setup.



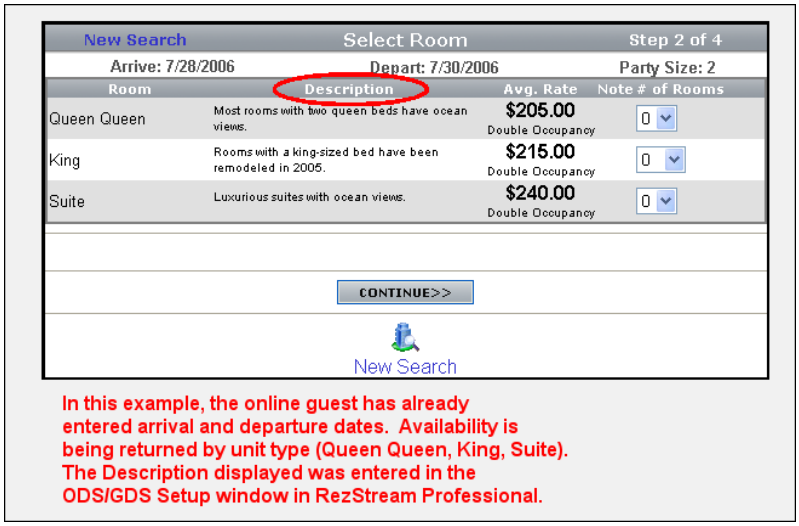

2. From the Unit Groups tab on the Unit Setup screen, click the GDS/ODS Settings button.




3. The GDS/ODS Setup window is displayed. In the BE Unit Type Description field, enter a description for each unit type/rate plan that will be available to online guests via the RezStream Booking Engine and click the Close button.

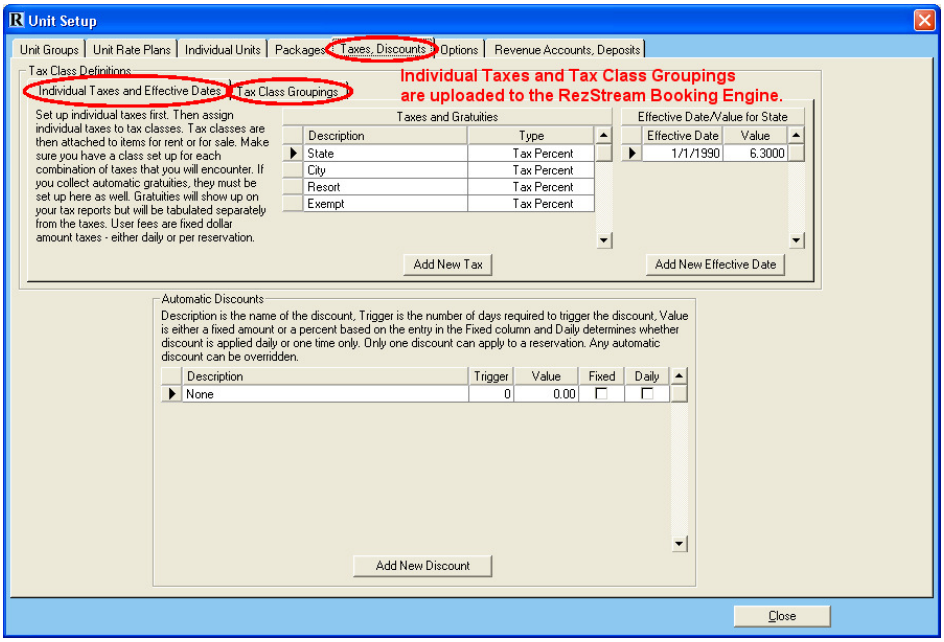

GDS/ODS Setup
Properties
Property Name
GDS Property Code
The Cliffhanger Resort
Enter ODS/GDS property and unit type codes here. The long unit type description will appear on the booking engine to describe your unit types when displaying availability by unit type. Text should be a brief but thorough description of each group of units that you have.
WARNING: Unless you have signed up for GDS and received valid GDS codes, do not enter anything in any of the code fields. Doing so may cause your Booking Engine to stop working.
Unit Type / Rate Plan
Rate Plan/Unit Type
Count
GDS Unit Type Code
Queen Queen
8
Suite
5
Meeting Rooms
2
Hot Air Balloon Rides
2
Boat Rentals
2
Bicycle Rentals
2
Rate # 9
0
GDS Unit Type Code
BE Unit Type Description
Most rooms with two queen beds have ocean views.
Close

4. The description entered in the GDS/ODS Setup window is transferred to the RezStream Booking Engine and displayed to online guests when availability is returned by unit type.


New Search
Select Room
Step 2 of 4
Arrive: 7/28/2006
Depart: 7/30/2006
Party Size: 2
Room
Description
Avg. Rate
Note # of Rooms
Queen Queen
Most rooms with two queen beds have ocean views.
$205.00
Double Occupancy
King
Rooms with a king-sized bed have been remodeled in 2005.
$215.00
Double Occupancy
Suite
Luxurious suites with ocean views.
$240.00
Double Occupancy
CONTINUE>>
New Search
In this example, the online guest has already entered arrival and departure dates. Availability is being returned by unit type (Queen Queen, King, Suite). The Description displayed was entered in the ODS/GDS Setup window in RezStream Professional.

# INDIVIDUAL TAXES AND TAX CLASS GROUPINGS

From the top toolbar in RezStream Professional, click Tools > Unit and Rate Setup and then select the Taxes, Discounts tab to verify that each Individual Tax and Tax Class Grouping defined in RezStream Professional should be uploaded to the RezStream Booking Engine.


Unit Setup
Unit Groups
Unit Rate Plans
Individual Units
Packages
Taxes, Discounts
Options
Revenue Accounts, Deposits
Tax Class Definitions
Individual Taxes and Effective Dates
Tax Class Groupings
Individual Taxes and Tax Class Groupings are uploaded to the RezStream Booking Engine.
Set up individual taxes first. Then assign individual taxes to tax classes. Tax classes are then attached to items for rent or for sale. Make sure you have a class set up for each combination of taxes that you will encounter. If you collect automatic gratuities, they must be set up here as well. Gratuities will show up on your tax reports but will be tabulated separately from the taxes. User fees are fixed dollar amount taxes - either daily or per reservation.
Taxes and Gratuities
Description
Type
State
Tax Percent
City
Tax Percent
Resort
Tax Percent
Exempt
Tax Percent
Effective Date/Value for State
Effective Date
Value
1/1/1990
6.3000
Add New Tax
Add New Effective Date
Automatic Discounts
Description is the name of the discount, Trigger is the number of days required to trigger the discount, Value is either a fixed amount or a percent based on the entry in the Fixed column and Daily determines whether discount is applied daily or one time only. Only one discount can apply to a reservation. Any automatic discount can be overridden.
Description
Trigger
Value
Fixed
Daily
None
0
0.00
Add New Discount
Close

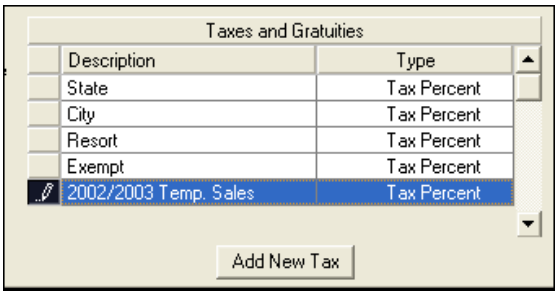
***Every individual tax and tax class grouping defined in RezStream Professional will be uploaded to the RezStream Booking Engine. If there are individual taxes and/or tax class groupings defined that are no longer used, they should be deleted from RezStream Professional.***

# INDIVIDUAL TAXES

Individual taxes that are defined but no longer required should be deleted prior to uploading data from RezStream Professional to the RezStream Booking Engine. Use the following steps to delete an individual tax that is no longer used.

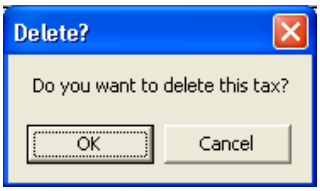
1. From RezStream Professional, click Tools > Unit and Rate Setup > Taxes, Discounts and select the Individual Taxes and Effective Dates tab.

2. Highlight the individual tax to be deleted in the Taxes and Gratuities table.




3. Press the <DELETE> key on your keyboard.

4. Click OK to confirm that the individual tax should be deleted.

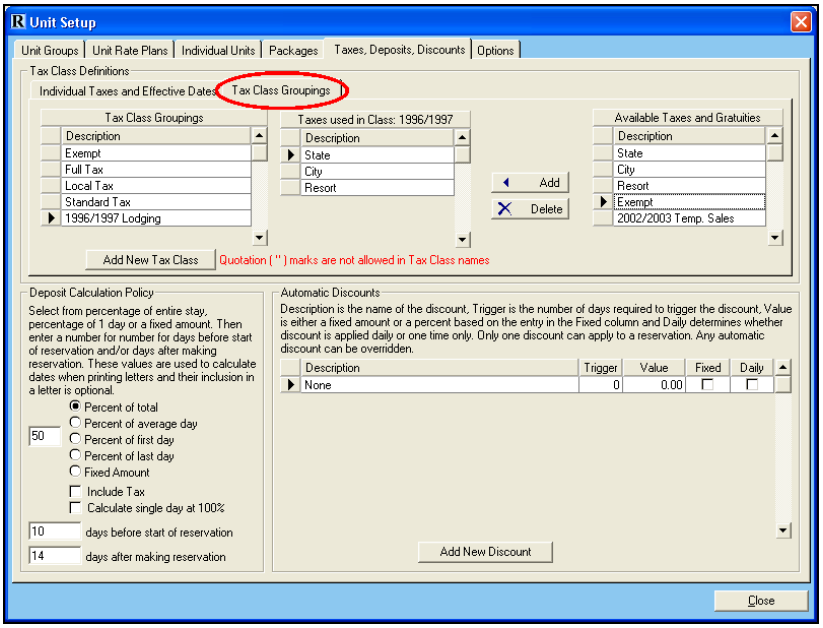



5. Repeat steps 2 – 4 for any individual tax that is defined but no longer required.

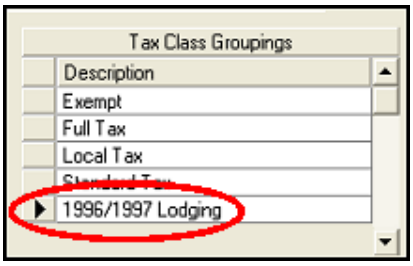
# TAX CLASS GROUPINGS

Tax class groupings that are defined but no longer required should also be deleted prior to uploading data from RezStream Professional to the RezStream Booking Engine. Use the following steps to delete a tax class grouping that is no longer used.

1. From RezStream Professional, click Tools > Unit and Rate Setup > Taxes, Discounts and select the Tax Class Groupings tab.

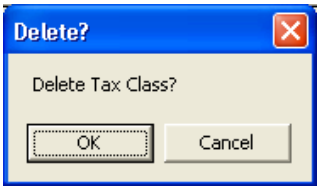

Unit Setup
Unit Groups
Unit Rate Plans
Individual Units
Packages
Taxes, Deposits, Discounts
Options
Tax Class Definitions
Individual Taxes and Effective Dates
Tax Class Groupings
Tax Class Groupings
Description
Exempt
Full Tax
Local Tax
Standard Tax
1996/1997 Lodging
Taxes used in Class: 1996/1997
Description
State
City
Resort
Add
Delete
Available Taxes and Gratuities
Description
State
City
Resort
Exempt
2002/2003 Temp. Sales
Add New Tax Class
Quotation (") marks are not allowed in Tax Class names
Deposit Calculation Policy
Select from percentage of entire stay, percentage of 1 day or a fixed amount. Then enter a number for number for days before start of reservation and/or days after making reservation. These values are used to calculate dates when printing letters and their inclusion in a letter is optional.
Percent of total
Percent of average day
Percent of first day
Percent of last day
Fixed Amount
50
Include Tax
Calculate single day at 100%
10
days before start of reservation
14
days after making reservation
Automatic Discounts
Description is the name of the discount, Trigger is the number of days required to trigger the discount, Value is either a fixed amount or a percent based on the entry in the Fixed column and Daily determines whether discount is applied daily or one time only. Only one discount can apply to a reservation. Any automatic discount can be overridden.
Description
Trigger
Value
Fixed
Daily
None
0
0.00
Add New Discount
Close

2. Highlight the tax class to be deleted in the Tax Class Groupings table.




3. Press the <DELETE> key on your keyboard.

4. Click OK to confirm that the tax class grouping should be deleted.

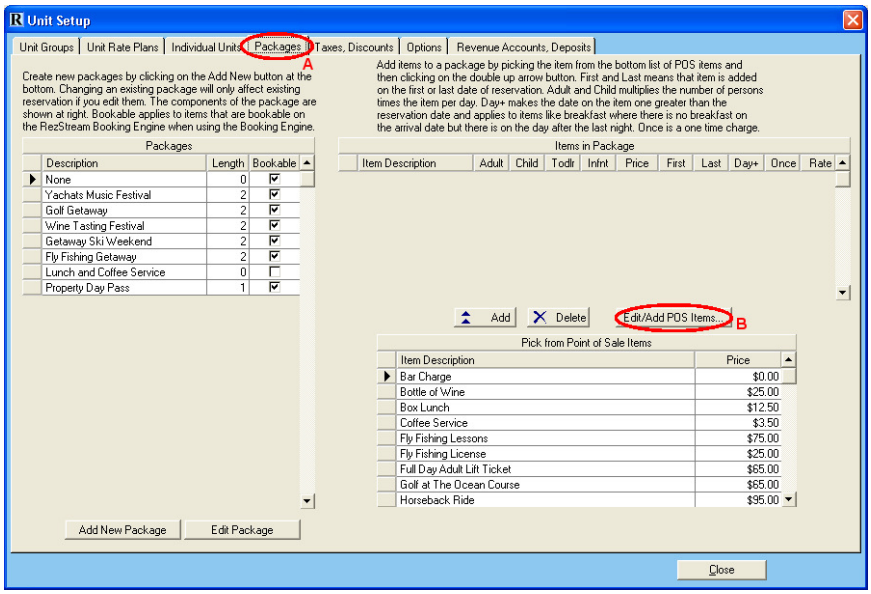



5. Repeat steps 2 – 4 to remove any tax class grouping that has been defined but is no longer required.

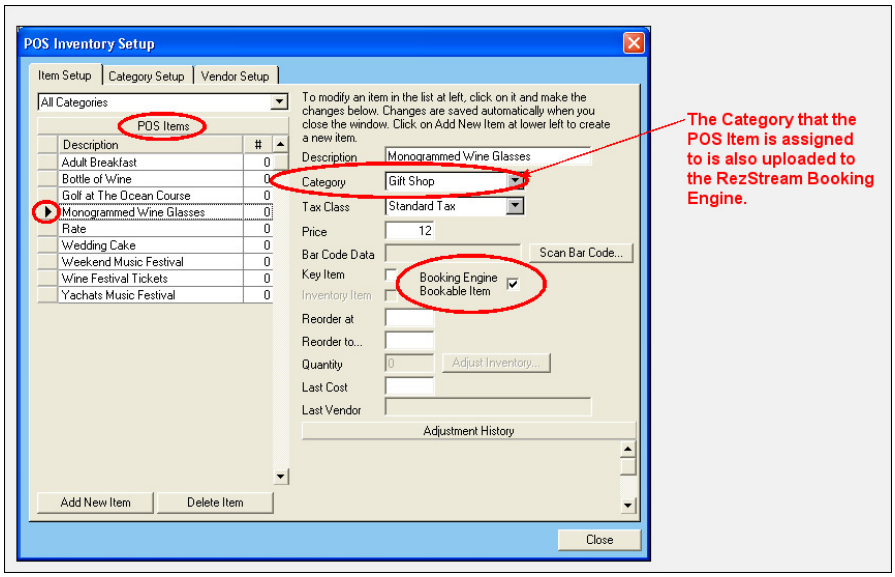
# POINT OF SALE ITEMS

Point of sale (POS) items can be sold as incidental charges or as a part of a package in the RezStream Booking Engine. For example, an online guest can purchase gift shop items while making a room reservation. Or, an adult breakfast may be included as part of a Music Festival package. Use the following steps to make point of sale items available on the RezStream Booking Engine.

1. From RezStream Professional, click Tools > Unit and Rate Setup and select the Packages tab (A) to access the Add/Edit POS Items button (B).


Unit Setup
Unit Groups
Unit Rate Plans
Individual Units
Packages
Taxes, Discounts
Options
Revenue Accounts, Deposits
A
Create new packages by clicking on the Add New button at the bottom. Changing an existing package will only affect existing reservation if you edit them. The components of the package are shown at right. Bookable applies to items that are bookable on the RezStream Booking Engine when using the Booking Engine.
Add items to a package by picking the item from the bottom list of POS items and then clicking on the double up arrow button. First and Last means that item is added on the first or last date of reservation. Adult and Child multiplies the number of persons times the item per day. Day+ makes the date on the item one greater than the reservation date and applies to items like breakfast where there is no breakfast on the arrival date but there is on the day after the last night. Once is a one time charge.
Packages
Description
Length
Bookable
None
Yachats Music Festival
Golf Getaway
Wine Tasting Festival
Getaway Ski Weekend
Fly Fishing Getaway
Lunch and Coffee Service
Property Day Pass
Items in Package
Item Description
Adult
Child
Todlr
Infnt
Price
First
Last
Day+
Once
Rate
Add
Delete
Edit/Add POS Items...
B
Pick from Point of Sale Items
Item Description
Price
Bar Charge $0.00
Bottle of Wine $25.00
Box Lunch $12.50
Coffee Service $3.50
Fly Fishing Lessons $75.00
Fly Fishing License $25.00
Full Day Adult Lift Ticket $65.00
Golf at The Ocean Course $65.00
Horseback Ride $95.00
Add New Package
Edit Package
Close

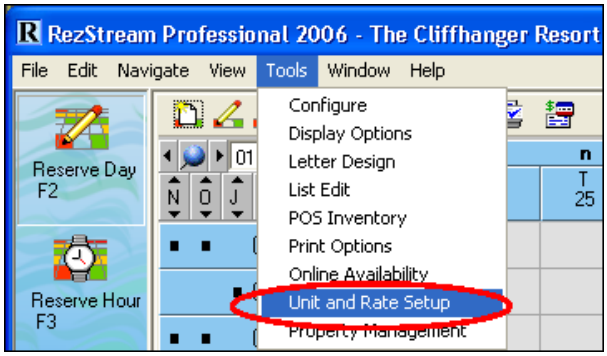
2. Click the Add/Edit POS Items button to view a list of all POS items on the POS Inventory Setup screen. For each POS item that will be available online, enter a checkmark in the Booking Engine Bookable Item field. The category that the POS item is assigned to is also uploaded to the RezStream Booking Engine. Categories are created from the Category Setup tab also located at the top of the POS Inventory screen.


POS Inventory Setup
Item Setup
Category Setup
Vendor Setup
All Categories
POS Items
Description
#
Adult Breakfast 0
Bottle of Wine 0
Golf at The Ocean Course 0
Monogrammed Wine Glasses 0
Rate 0
Wedding Cake 0
Weekend Music Festival 0
Wine Festival Tickets 0
Yachats Music Festival 0
To modify an item in the list at left, click on it and make the changes below. Changes are saved automatically when you close the window. Click on Add New Item at lower left to create a new item.
Description Monogrammed Wine Glasses
Category Gift Shop
Tax Class Standard Tax
Price 12
Bar Code Data
Scan Bar Code...
Key Item
Booking Engine Bookable Item
Inventory Item
Reorder at
Reorder to...
Quantity 0
Adjust Inventory...
Last Cost
Last Vendor
Adjustment History
Add New Item
Delete Item
Close
The Category that the POS Item is assigned to is also uploaded to the RezStream Booking Engine.

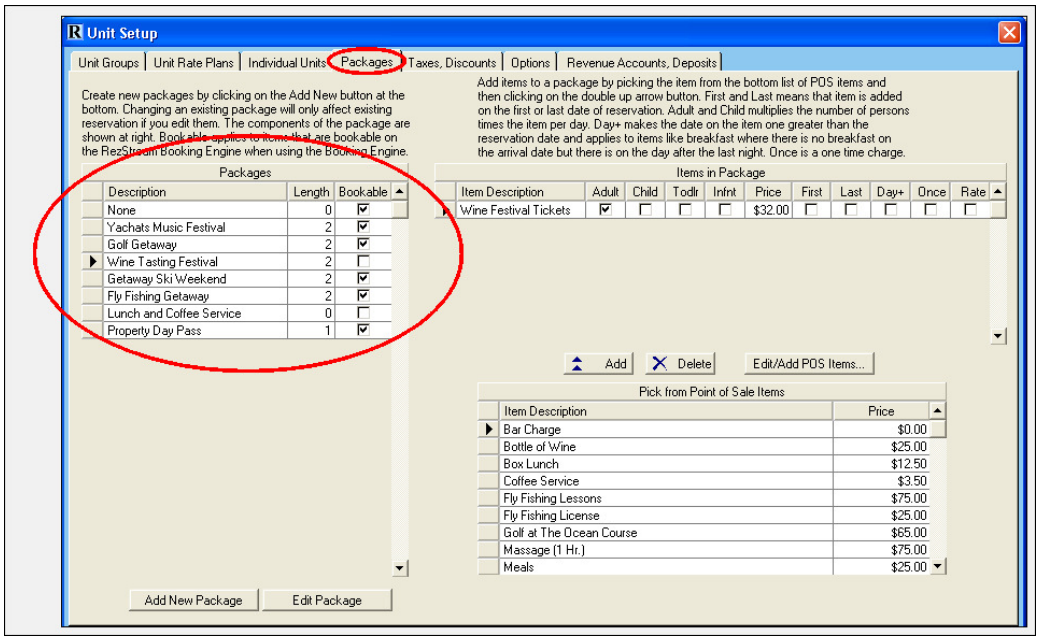
# PACKAGES

RezStream Professional packages can be uploaded to the RezStream Booking Engine. Use the following steps to flag packages so that they are uploaded to the RezStream Booking Engine.

1. From the RezStream Professional top toolbar, click Tools > Unit and Rate Setup.

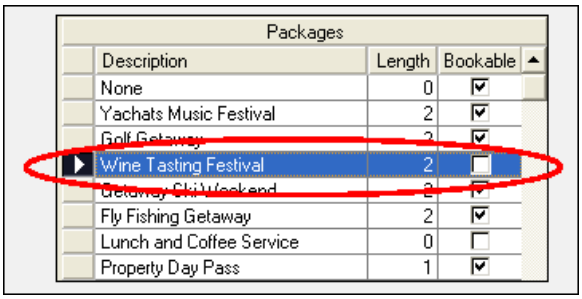



2. Click the Packages tab. Individual packages that have been previously defined in RezStream Professional are listed in the Packages table.

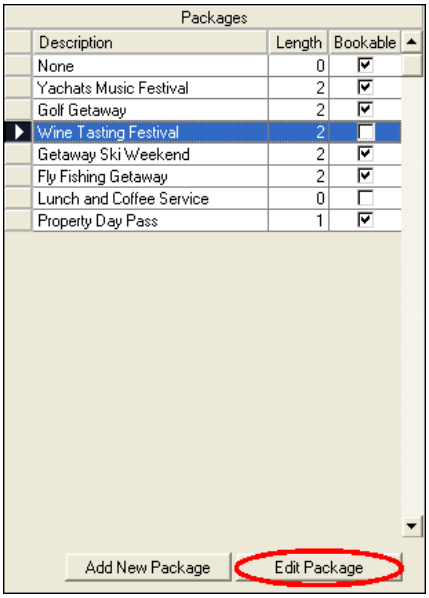

Unit Setup
Unit Groups
Unit Rate Plans
Individual Units
Packages
Taxes, Discounts
Options
Revenue Accounts, Deposits
Create new packages by clicking on the Add New button at the bottom. Changing an existing package will only affect existing reservation if you edit them. The components of the package are shown at right. Bookable applies to items that are bookable on the RezStream Booking Engine when using the Booking Engine.
Add items to a package by picking the item from the bottom list of POS items and then clicking on the double up arrow button. First and Last means that item is added on the first or last date of reservation. Adult and Child multiplies the number of persons times the item per day. Day+ makes the date on the item one greater than the reservation date and applies to items like breakfast where there is no breakfast on the arrival date but there is on the day after the last night. Once is a one time charge.
Packages
Description
Length
Bookable
None
Yachats Music Festival
Golf Getaway
Wine Tasting Festival
Getaway Ski Weekend
Fly Fishing Getaway
Lunch and Coffee Service
Property Day Pass
Items in Package
Item Description
Adult
Child
Todlr
Infnt
Price
First
Last
Day+
Once
Rate
Wine Festival Tickets
$32.00
Add
Delete
Edit/Add POS Items...
Pick from Point of Sale Items
Item Description
Price
Bar Charge
Bottle of Wine
Box Lunch
Coffee Service
Fly Fishing Lessons
Fly Fishing License
Golf at The Ocean Course
Massage (1 Hr.)
Meals
Add New Package
Edit Package

3. The Packages table contains a Bookable column. A checkmark in this column indicates that the package will be uploaded to the RezStream Booking Engine. Use the steps below to add a checkmark in the Bookable field.

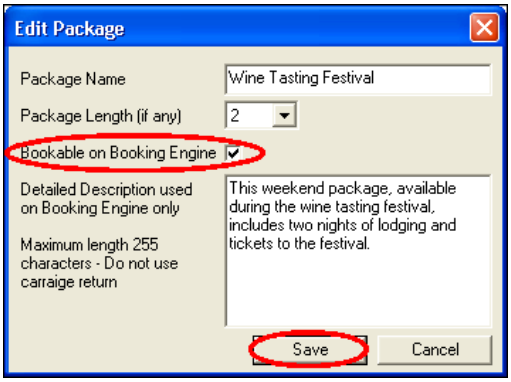
   a. Highlight a specific package in the Packages table.




   b. Click the Edit Package button on the lower left-hand side of the Unit Setup screen.



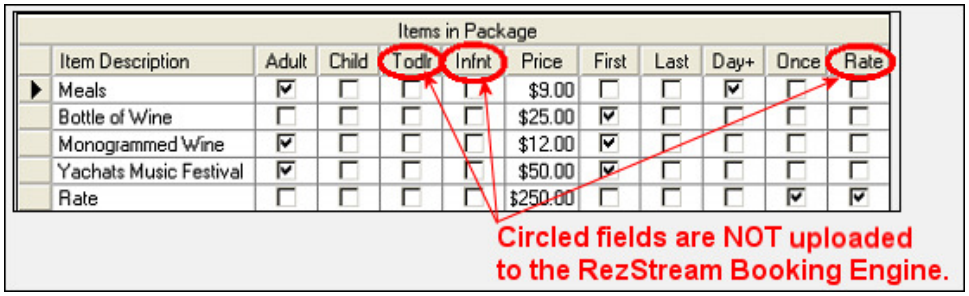

   c. The Edit Package window is displayed. Enter a checkmark in the Bookable on Booking Engine field.


Edit Package
Package Name
Wine Tasting Festival
Package Length (if any)
2
Bookable on Booking Engine
Detailed Description used on Booking Engine only
Maximum length 255 characters - Do not use carraige return
This weekend package, available during the wine tasting festival, includes two nights of lodging and tickets to the festival.
Save
Cancel

   d. Click the Save button. A checkmark will now appear in the Bookable column for the Wine Tasting Festival in the Packages table.

## NOTE ABOUT PACKAGE FIELDS

Under the Packages tab on the Unit Setup screen in RezStream Professional, the following package fields are used to define what items are included in a package and how charges are applied.




As of February 2007, the following fields are NOT uploaded from RezStream Professional to the RezStream Booking Engine.

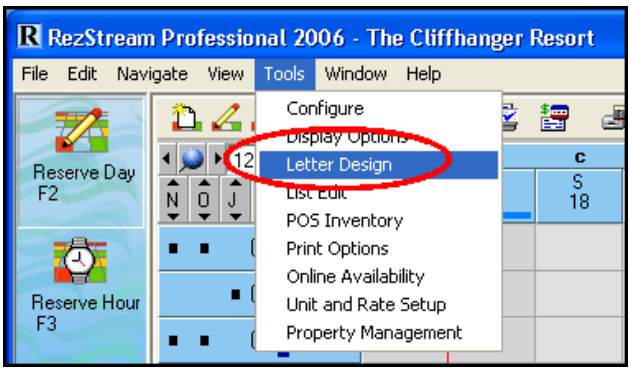
- Person Rate Type 3 (Todlr)
- Person Rate Type 4 (Infnt)
- Rate

# LETTERS

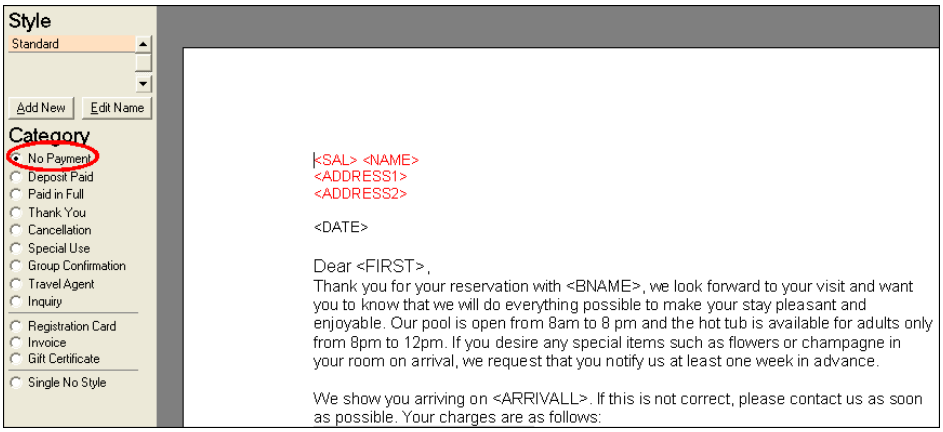
Two guest confirmation letters are automatically uploaded from RezStream Professional to the RezStream Booking Engine.

1. No Payment
2. Deposit Paid

To review these two guest confirmation letters prior to uploading them to the RezStream Booking Engine, login to RezStream Professional and click Tools > Letter Design.



To view a specific letter and make sure that it reflects the information you would like communicated to guests who make reservations via the RezStream Booking Engine, click its radio button in the left-hand frame.


Style
Standard
Add New
Edit Name
Category
No Payment
Deposit Paid
Paid in Full
Thank You
Cancellation
Special Use
Group Confirmation
Travel Agent
Inquiry
Registration Card
Invoice
Gift Certificate
Single No Style
<SAL> <NAME>
<ADDRESS1>
<ADDRESS2>
<DATE>
Dear <FIRST>,
Thank you for your reservation with <BNAME>, we look forward to your visit and want you to know that we will do everything possible to make your stay pleasant and enjoyable. Our pool is open from 8am to 8 pm and the hot tub is available for adults only from 8pm to 12pm. If you desire any special items such as flowers or champagne in your room on arrival, we request that you notify us at least one week in advance.
We show you arriving on <ARRIVALL>. If this is not correct, please contact us as soon as possible. Your charges are as follows:

Confirmation letters are the only letters included in the initial upload from RezStream Professional to the RezStream Booking Engine. If changes to these letters are made in RezStream Professional **after** the initial upload, the changes must also be made in the RezStream Booking Engine Online Administrative Interface using the RezStream Booking Engine Property > Letters link.

Due to the fact that letters are not automatically synchronized after the initial upload, it is possible to use the RezStream Professional confirmation letters as a starting point for online confirmations and customize their content for RezStream Booking Engine online guests. Any customizations for online guests are made in the RezStream Booking Engine Online Administrative Interface by clicking the Property > Letters link.

# REASONS FOR RESERVATION

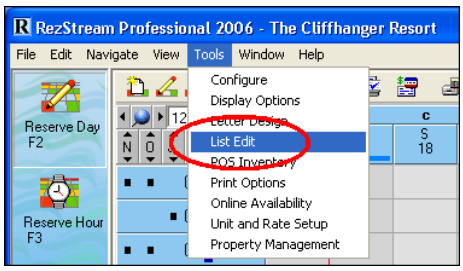
Reasons for reservation defined in RezStream Professional are helpful when tracking the types of guests visiting your property (i.e. – are guests traveling for leisure or for business). The RezStream Booking Engine can be configured one of three ways when a guest is making an online reservation.

1. Allow guests to select a reason for reservation.
2. Force guests to select a reason for reservation.
3. Always use a specific reason for reservation for online reservations.

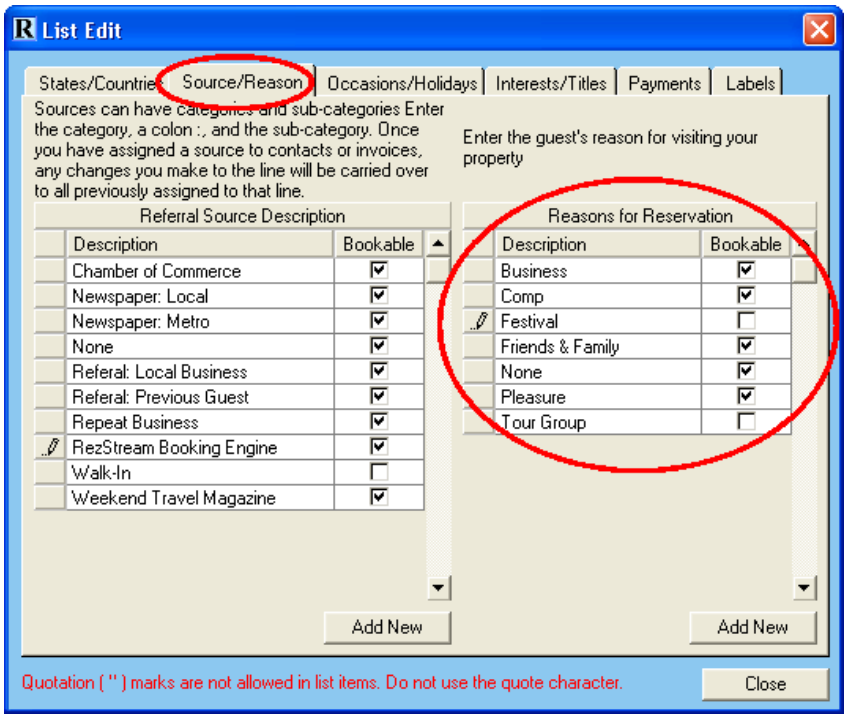
This setting is defined in the RezStream Booking Engine Online Administrative Interface by clicking Property > Booking Engine Settings > Reservation Defaults > Sources/Reasons.

Use the following steps to specify which reasons for reservation defined in RezStream Professional will be uploaded to the RezStream Booking Engine.

1. From RezStream Professional, click Tools > List Edit.



2. Click the Source/Reason tab. Only those reasons for reservation with a checkmark in the Bookable field will be uploaded to the RezStream Booking Engine. In the example below, the Festival and Tour Group reasons for reservation will NOT be uploaded to the RezStream Booking Engine.




# REFERRAL SOURCES

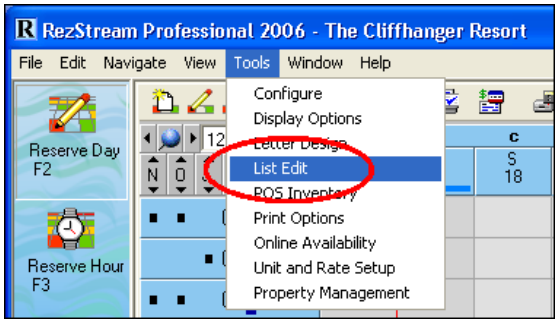
Referral sources defined in RezStream Professional are helpful when tracking marketing expenditures and are uploaded directly to the RezStream Booking Engine. The RezStream Booking Engine can be configured one of three ways when guests are making an online reservation.

1. Allow guests to select a referral source.
2. Force guests to select a referral source.
3. Always use a specific referral source for online reservations.

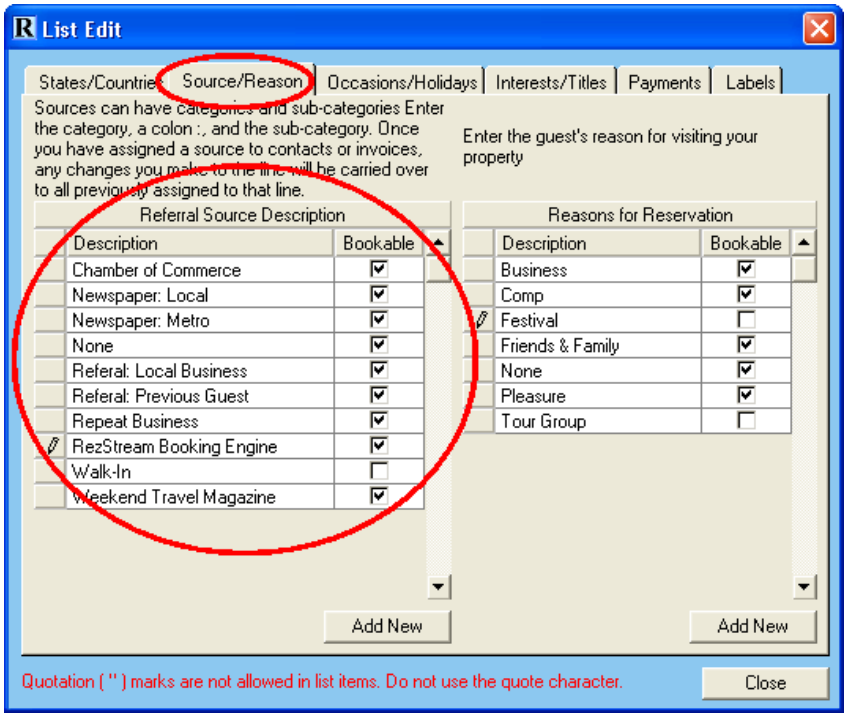
This setting is defined in the RezStream Booking Engine Online Administrative Interface by clicking Property > Booking Engine Settings > Reservation Defaults > Source/Reason.

Use the following steps to specify which referral sources defined in RezStream Professional will be uploaded to the RezStream Booking Engine.

1. From RezStream Professional, click Tools > List Edit.




2. Click the Source/Reason tab. Only those referral sources with a checkmark in the Bookable field will be uploaded to the RezStream Booking Engine. In the example below, the Walk-In referral source will NOT be uploaded to the RezStream Booking Engine.



# 2. UPLOAD REZSTREAM PROFESSIONAL DATA

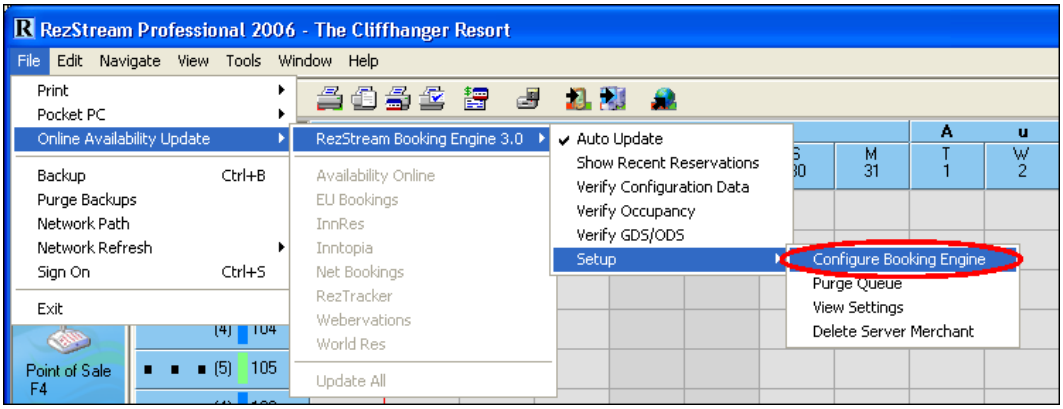
Once the settings in RezStream Professional have been verified using the steps outlined in the preceding section, the second step in taking your RezStream Booking Engine live is to upload RezStream Professional data to the RezStream Booking Engine. The following information is uploaded directly from the RezStream Professional software.

1. Business Data
2. Rate Plans, Rate Names, and Rate Seasons
3. Unit Long Names and Standard Descriptions
4. Rate Plan Long Descriptions
5. Individual Taxes and Tax Class Groupings
6. Point of Sale Items
7. Packages
8. Letters
9. Reasons for Reservation
10. Referral Sources

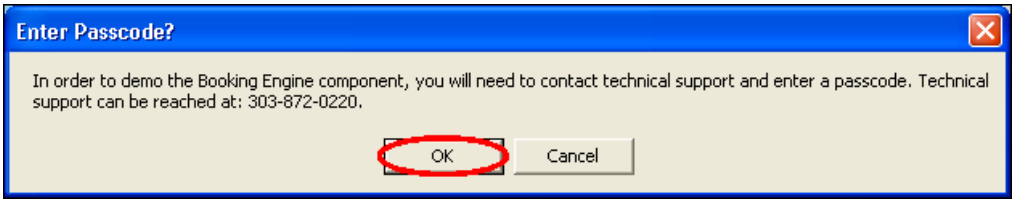
***Please contact the RezStream support desk if you have any questions about configuring RezStream Professional prior to uploading data to the RezStream Booking Engine.***

To upload RezStream Professional settings to the RezStream Booking Engine, obtain your passcode from RezStream support at 303-872-0220, launch RezStream Professional, and click:

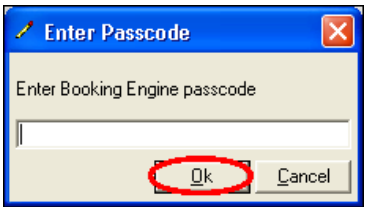
File > Online Availability Update > RezStream Booking Engine 3.0 > Setup > Configure Booking Engine.




The "Enter Passcode?" window is displayed. Click OK.

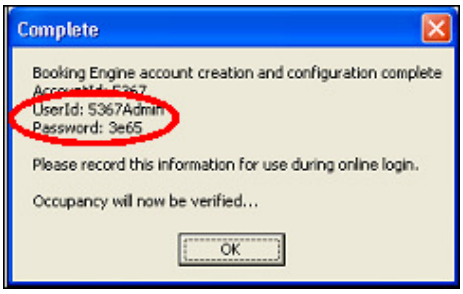

Enter Passcode?
In order to demo the Booking Engine component, you will need to contact technical support and enter a passcode. Technical support can be reached at: 303-872-0220.
OK
Cancel

Enter your RezStream Booking Engine passcode and click the OK button.




RezStream Professional settings are automatically transferred to the RezStream Booking Engine.

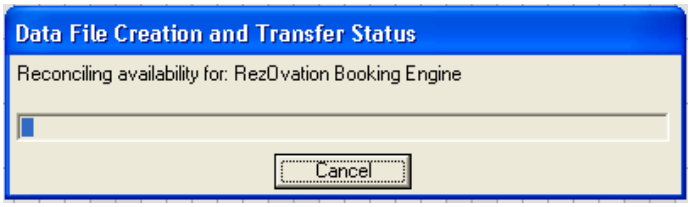
The Complete window is displayed.




The Complete window lists important information for logging into the RezStream Booking Engine Online Administrative Interface, including your property's UserID and Password. Click OK in the Complete window.

***Make a note of the UserID and Password displayed in the Complete window. This information is required for accessing the RezStream Booking Engine Online Administrative Interface. The Online Administrative Interface is used for completing settings that are specific to the RezStream Booking Engine.***

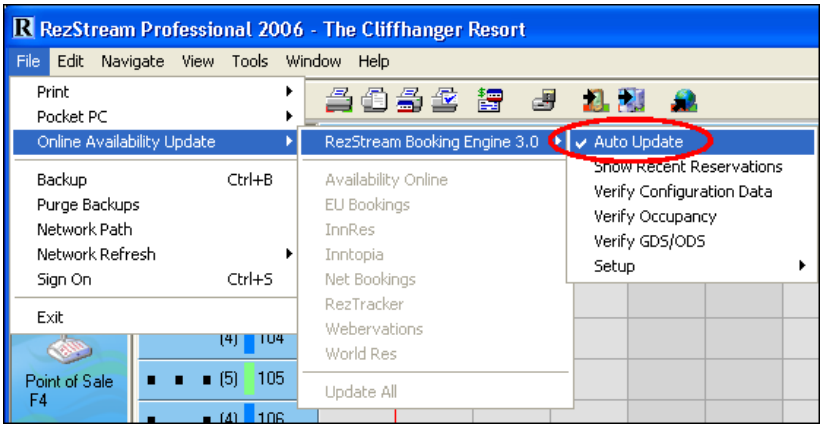
Next, occupancy is verified and RezStream Professional availability is synchronized with the RezStream Booking Engine.




***The password assigned during the upload process can be changed when logging into the RezStream Booking Engine for the first time.***

# AUTO UPDATE

After completing the initial RezStream Booking Engine configuration, turn on the Auto Update feature in RezStream Professional by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Auto Update.



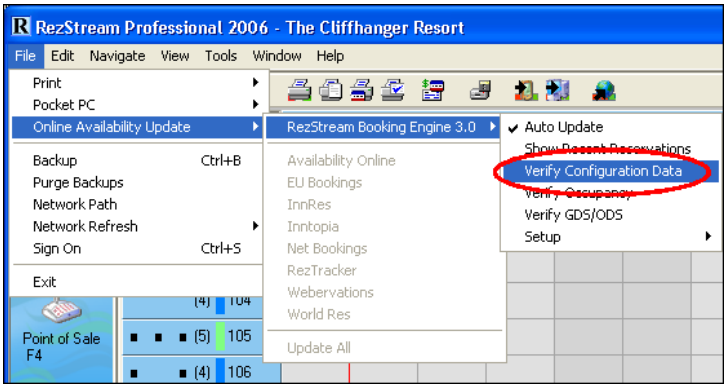

The Auto Update feature automatically synchronizes availability between RezStream Professional and the RezStream Booking Engine.

***If you are running RezStream Professional in a network environment, Auto Update only needs to be activated on ONE computer. RezStream Professional should be left open (or minimized) at ALL times on this computer in order to continuously receive RezStream Booking Engine reservations.***

# UPLOADING REZSTREAM PROFESSIONAL CHANGES

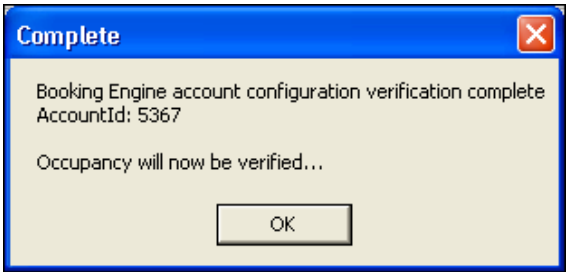
From time to time, you may want to change settings that were uploaded from RezStream Professional to the RezStream Booking Engine, for example, unit rates, taxes, or point of sale items. ***You should ONLY make changes to these settings in RezStream Professional.*** Once you have changed key information within RezStream Professional, you may then upload these changes to an existing RezStream Booking Engine account. When these RezStream Professional configuration settings are changed, for example, a new reason for reservation is added, the change is made in RezStream Professional and then uploaded to the RezStream Booking Engine using the following RezStream Professional menu option.

File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.



After selecting the Verify Configuration Data option, RezStream Professional automatically creates a configuration file and uploads it to the RezStream Booking Engine.

After transferring the configuration file to the RezStream Booking Engine, the Complete window is displayed and occupancy is synchronized between RezStream Professional and the RezStream Booking Engine.




***RezStream recommends making a batch of changes in RezStream Professional and then uploading the batch to the RezStream Booking Engine. Because occupancy is verified as part of the Verify Configuration process, as more and more reservations are added, it will take longer to complete the upload process.***

## NOTE REGARDING CONFIRMATION LETTERS

The "No Payment" and "Deposit Paid" confirmation letters are uploaded from RezStream Professional to the RezStream Booking Engine during the initial configuration ONLY. They are NOT uploaded as part of the Verify Configuration Data utility described above. Changes to letters that should be reflected in both RezStream Professional and the RezStream Booking Engine must be made twice, once in the RezStream Professional software and again in the RezStream Booking Engine Online Administrative Interface.

# 3. ACCESS THE ONLINE ADMINISTRATIVE INTERFACE

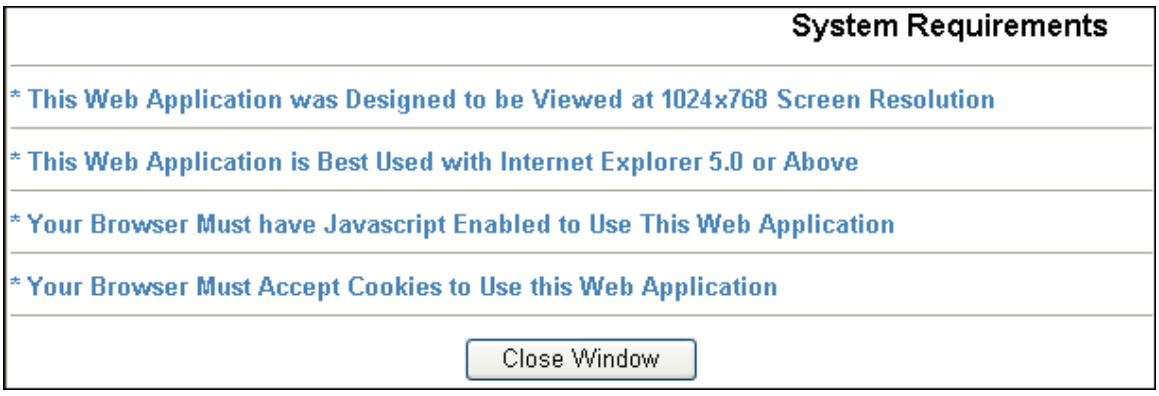
Once RezStream Professional data is uploaded to the RezStream Booking Engine, booking engine specific settings can be completed using the RezStream Booking Engine Online Administrative Interface. Access the Online Administrative Interface by entering the following URL in your Internet Browser.

http://www.rezstream.net/booking_engine/
(Please note there is an underscore between the words 'booking' and 'engine.')

Login to the RezStream Booking Engine Online Administrative Interface using the UserID and Password assigned during the initial RezStream Booking Engine configuration.

## SYSTEM REQUIREMENTS

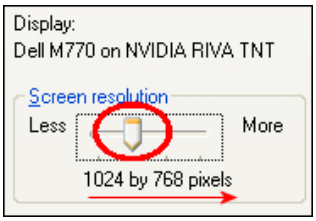
Clicking the link "System Requirements" displays the following information.


System Requirements
* This Web Application was Designed to be Viewed at 1024x768 Screen Resolution
* This Web Application is Best Used with Internet Explorer 5.0 or Above
* Your Browser Must have Javascript Enabled to Use This Web Application
* Your Browser Must Accept Cookies to Use this Web Application
Close Window

## SCREEN RESOLUTION

To view your current screen resolution, use the following steps.

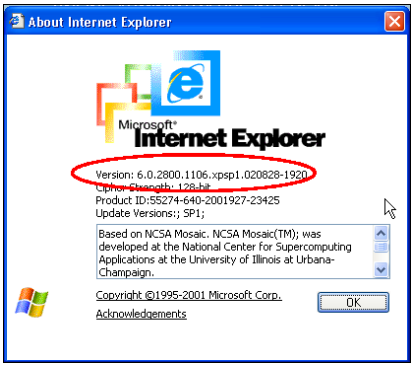
1. Display your Windows desktop and click the right mouse button.
2. Select Properties.
3. Click the Settings tab and note the setting for screen resolution. To increase the setting for screen resolution, simply drag the Screen Resolution pointer to the right.




## INTERNET EXPLORER VERSION

Use the following steps for verifying your Internet Explorer version.

1. Launch Internet Explorer ( ).
2. Click Help > About Internet Explorer. Note the version number.


About Internet Explorer
Microsoft
Internet Explorer
Version: 6.0.2800.1106.xpsp1.020828-1920
Cipher Strength: 128-bit
Product ID:55274-640-2001927-23425
Update Versions:; SP1;
Based on NCSA Mosaic. NCSA Mosaic(TM); was developed at the National Center for Supercomputing Applications at the University of Illinois at Urbana-Champaign.
Copyright ©1995-2001 Microsoft Corp.
Acknowledgements
OK

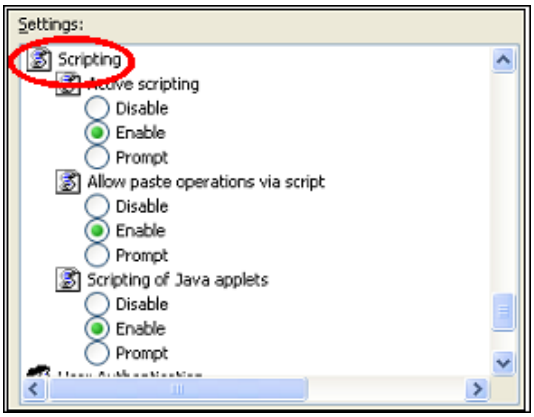
3. If the version is less than 5.0, please download an Internet Explorer update from the Microsoft website. (http://www.microsoft.com/downloads)

## JAVASCRIPT

To ensure that JavaScript can run within Internet Explorer, use the following steps.

1. Launch Internet Explorer ( ).
2. Click Tools > Internet Options.
3. Select the Security tab and click the "Custom Level" button.

4. Scroll down to the "Scripting" section and make sure all scripting options are enabled.




## COOKIES

Cookies are used by web based applications for storing information about a particular session. In the case of the RezStream Booking Engine, cookies store information used during the RezStream Booking Engine configuration process. To ensure that the RezStream Booking Engine Online Administrative Interface can be used, a "Low" privacy setting is recommended. Set the privacy setting to "Low" using the following steps.

1. Launch Internet Explorer ( ).
2. Click Tools > Internet Options and select the Privacy tab.
3. Drag the Privacy setting to "Low."

***After configuring the RezStream Booking Engine using the RezStream Booking Engine Online Administrative Interface, return the Privacy setting to its original state.***

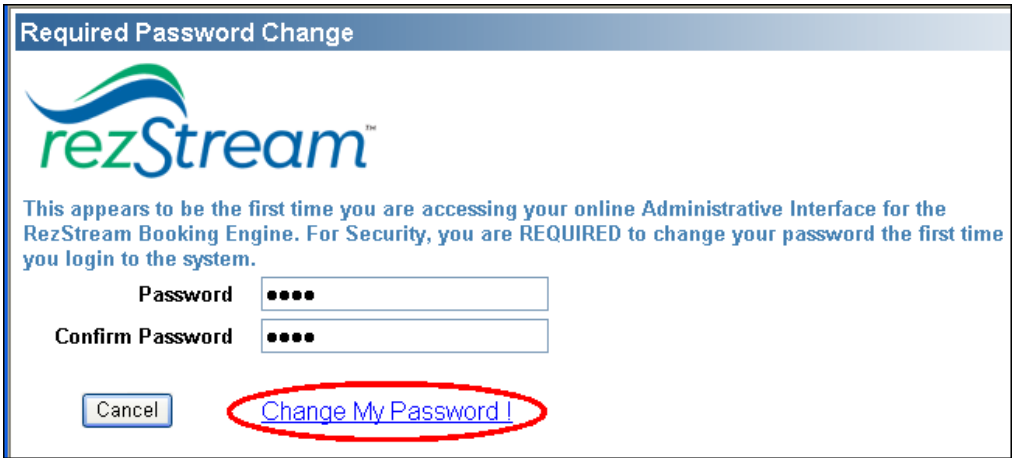
## INTERNET CONNECTION

***In addition to the system requirements listed above, we strongly recommend that you use the RezStream Booking Engine with a full time, high speed Internet connection.***
The connection speed should be equivalent to a cable modem or DSL. With a full time, high speed Internet connection, setup can be completed in a timely manner. In addition, with a high speed connection, files can be uploaded to the RezStream Booking Engine Online Administrative Interface. Finally, with a full time Internet connection, bookings can be communicated to your property 24 hours a day, 365 days a year.

Most Internet Service Providers (ISPs) offer a form of high speed Internet connection. For options in your area, please contact your ISP.

# CHANGING THE DEFAULT REZSTREAM BOOKING ENGINE PASSWORD

The first time you login to the RezStream Booking Engine Online Administrative Interface, you are prompted to change your password. Enter a new password, confirm the password, and click the Change My Password link.


Required Password Change
rezStream
This appears to be the first time you are accessing your online Administrative Interface for the RezStream Booking Engine. For Security, you are REQUIRED to change your password the first time you login to the system.
Password
Confirm Password
Cancel
Change My Password !

# THE REZSTREAM BOOKING ENGINE ONLINE ADMINISTRATIVE INTERFACE HOME PAGE

After changing your password, the RezStream Booking Engine Online Administrative Interface home page is displayed. The RezStream Booking Engine is configured sequentially, adding information in the prescribed order, which falls into one of the following categories:

1. Account setup
2. Property setup

Pointing the mouse at the text "Account" or "Property" displays a topic appropriate drop-down menu.

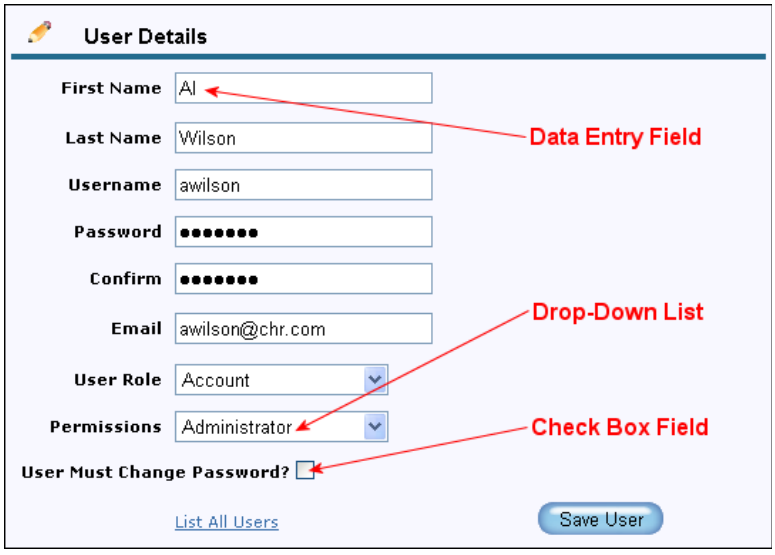
# ENTERING INFORMATION IN THE REZSTREAM BOOKING ENGINE ONLINE ADMINISTRATIVE INTERFACE

The RezStream Booking Engine Online Administrative Interface uses web forms (pages) for gathering information about your property.

***Before we move onto the actual setup steps, we will take a moment to explain some of the web page forms and other tools you will be using in the RezStream Booking Engine Online Administrative Interface.***

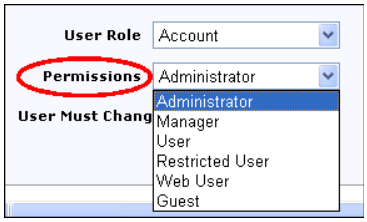
## COMMON FORMS

Most forms use a combination of data entry fields, drop-down lists, and check boxes. The example below shows data entry fields for entering text as well as drop-down lists. We will see this form later under Account > Account Information > Users > Edit User Display Name.




***The RezStream Booking Engine Online Administrative Interface does not allow you to manually enter data in a drop-down list field. You MUST select an option from the drop-down list.***

In the sample "User Details" form above, "First Name" is a data entry field. To enter your first name, position the cursor at the beginning of the line and manually enter data. "Permissions" is an example of a drop-down list. Clicking the downward arrow displays a list of choices. To access a drop-down menu, click the down arrow. Once the list is displayed, select an option from the list.




An example of a check box is also on the User Details form above. If the "User Must Change Password" check box is selected, users will be forced to change their password the next time they log into the RezStream Booking Engine Online Administrative Interface.

## COMMON ICONS

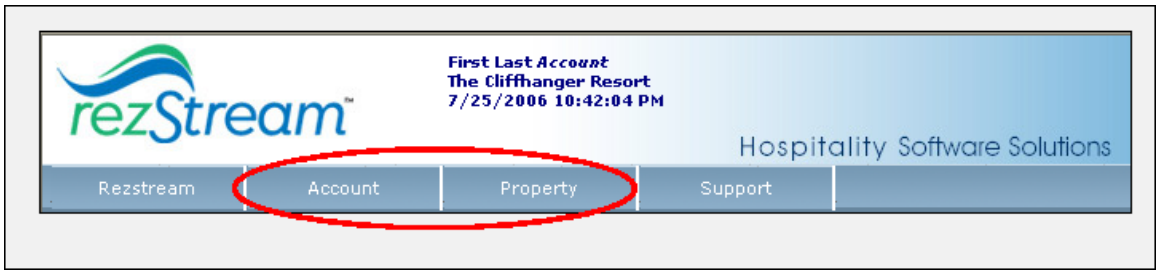
Icons are used in an effort to assist in completing a specific task. Left click an icon to perform the desired task. For example, a pencil icon is often used to access editing screens. Editing screens are used to change or add information. A red X icon is used for deletion purposes.

| ICON | DESCRIPTION |
|---|---|
| | Edit Icon: Use to change or add information. The edit icon is displayed in a number of forms. Example: Account > Account Information > Users. Here, use the edit icon to change RezStream Booking Engine User Details. |
| | Delete Icon: Left click this icon to delete an item. Example: Account > Account Information > Users. Here, use the delete icon to delete a RezStream Booking Engine user. |

# 4. ORGANIZE BOOKING ENGINE SPECIFIC INFORMATION

Once you have initially configured the RezStream Booking Engine and have logged into the RezStream Booking Engine Online Administrative Interface, RezStream recommends organizing the information necessary for completing the booking engine specific settings described in this section. Having this information organized will assist you in completing the two main setup sections in the RezStream Booking Engine Online Administrative Interface.

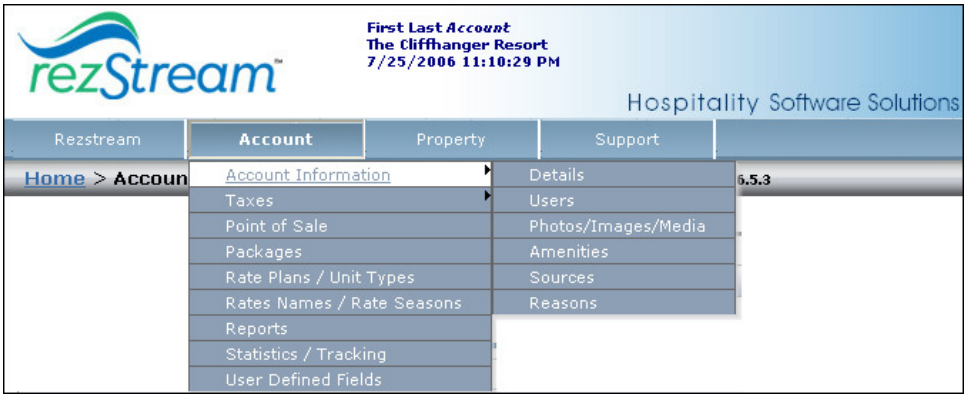
1. Account setup
2. Property setup




***The headings marked as Optional in the following section are NOT required in order to complete the RezStream Booking Engine's initial setup.***

# ACCOUNT SETUP

The Account drop-down menu is accessed by logging in to the RezStream Booking Engine Online Administrative Interface and pointing your mouse at the text "Account" in the top navigation toolbar.




The majority of the information required to complete Account setup is entered in RezStream Professional and uploaded to the RezStream Booking Engine.

***The headings below represent Account setup information that is NOT uploaded from RezStream Professional. This information will need to be entered directly into the RezStream Booking Engine Online Administrative Interface. Optional steps are marked accordingly.***

## ACCOUNT INFORMATION > DETAILS

The Account Details form is accessed by clicking Account > Account Information > Details. All of the information in the Account Details form is uploaded from RezStream Professional except:

1. Primary Contact – Typically the property's owner.
2. Secondary Contact – One of the property's managers.

## ACCOUNT INFORMATION > USERS

You will need to create a New User profile for each employee that will use the RezStream Booking Engine. The RezStream Booking Engine allows for multiple users with similar or different account permission settings. Permission settings grant full or limited access to key property information such as unit rates and policies.

## ACCOUNT INFORMATION > PHOTOS/IMAGES/MEDIA (OPTIONAL)

Displaying images to online guests in the RezStream Booking Engine can be helpful in creating a more visual reservation experience for your potential guests. If you want to display images of your property, unit types, or specific rooms when a guest checks availability on your website, digitize these images into high quality .JPEG files no larger than 200 pixels x 300 pixels.

## ACCOUNT INFORMATION > AMENITIES (OPTIONAL)

The RezStream Booking Engine features two types of amenities, standard and unit level.

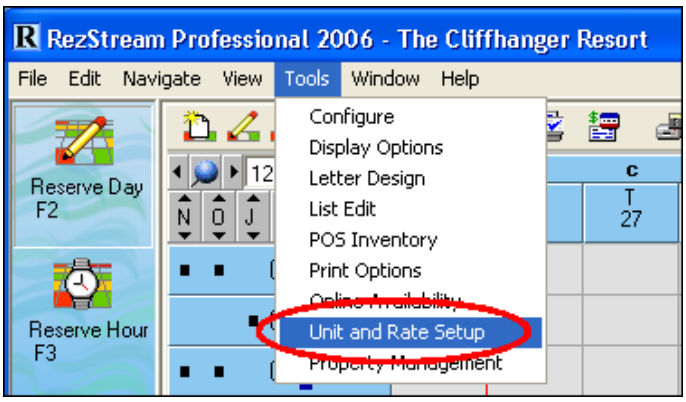
Amenities that describe the property as a whole are known as standard amenities. The only properties that need to be concerned with designating standard amenities are those businesses that are configuring the RezStream Booking Engine for multiple properties. In these instances, compile a list of standard amenities that describe each separate property, for example:

1. Heated Pool
2. Full Service Spa

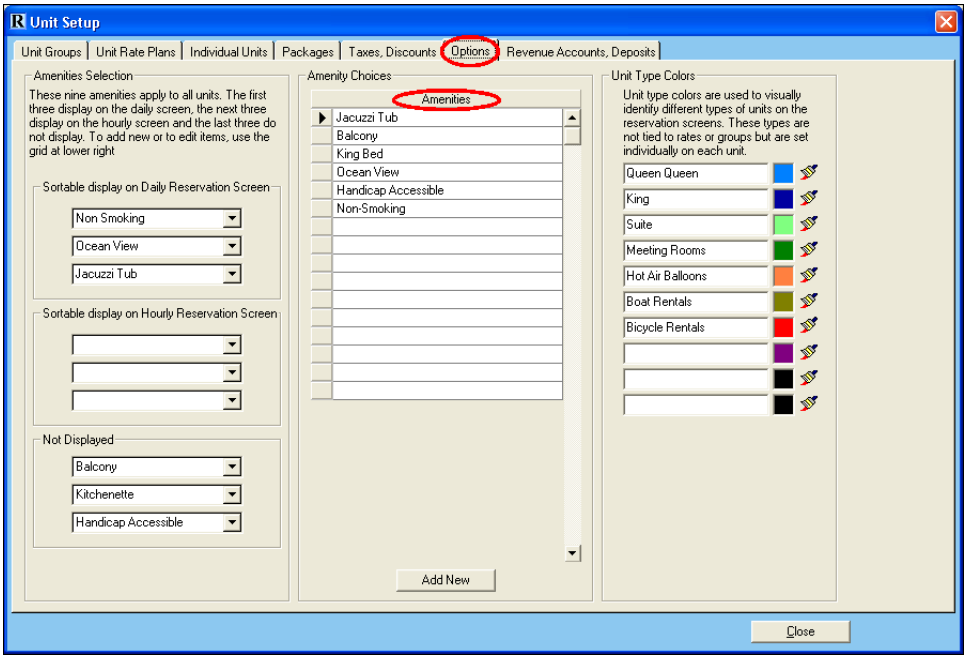
Unit level amenities are created to describe units or unit types to Internet guests. In addition, unit level amenities can be flagged as sortable, allowing potential guests to perform an advanced search when making a reservation. This advanced search can help guests find rooms with specific criteria. For many properties, unit level amenities are already defined in RezStream Professional. However, these amenities are NOT uploaded to the RezStream Booking Engine. Use the following steps to review unit level amenities that have been previously defined in RezStream Professional.

1. Login to RezStream Professional.

2. Click Tools > Unit and Rate Setup.



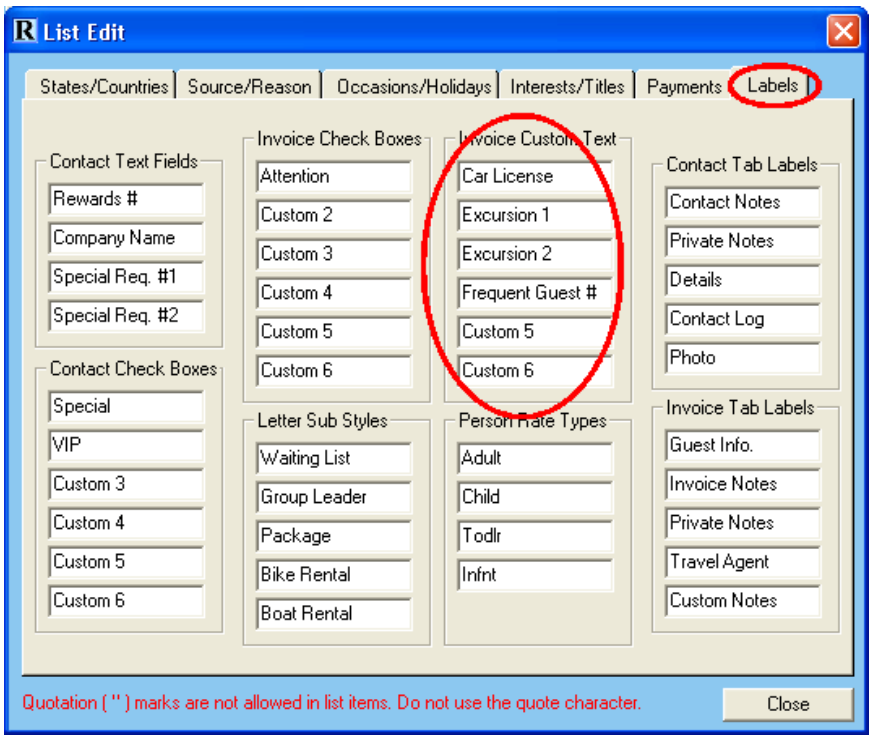

3. Click the Options tab on the Unit Setup screen. Previously defined unit level amenities are listed in the Amenities table.



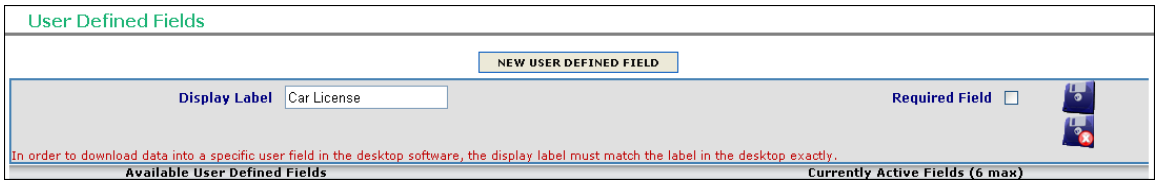

4. In most cases, the unit level amenities defined in RezStream Professional should match the unit level amenities in the RezStream Booking Engine. If this is the case at your property, note the unit level amenities in the Amenities table and use this information for defining amenities in the RezStream Booking Engine Online Administrative Interface.

# USER DEFINED FIELDS (OPTIONAL)

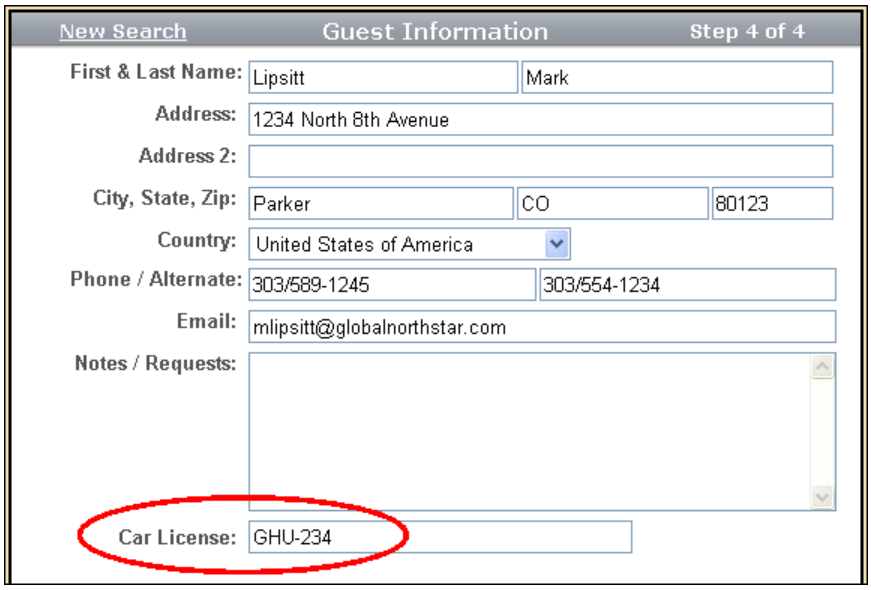
Field labels for user defined fields are specified in RezStream Professional by clicking Tools > List Edit > Labels.



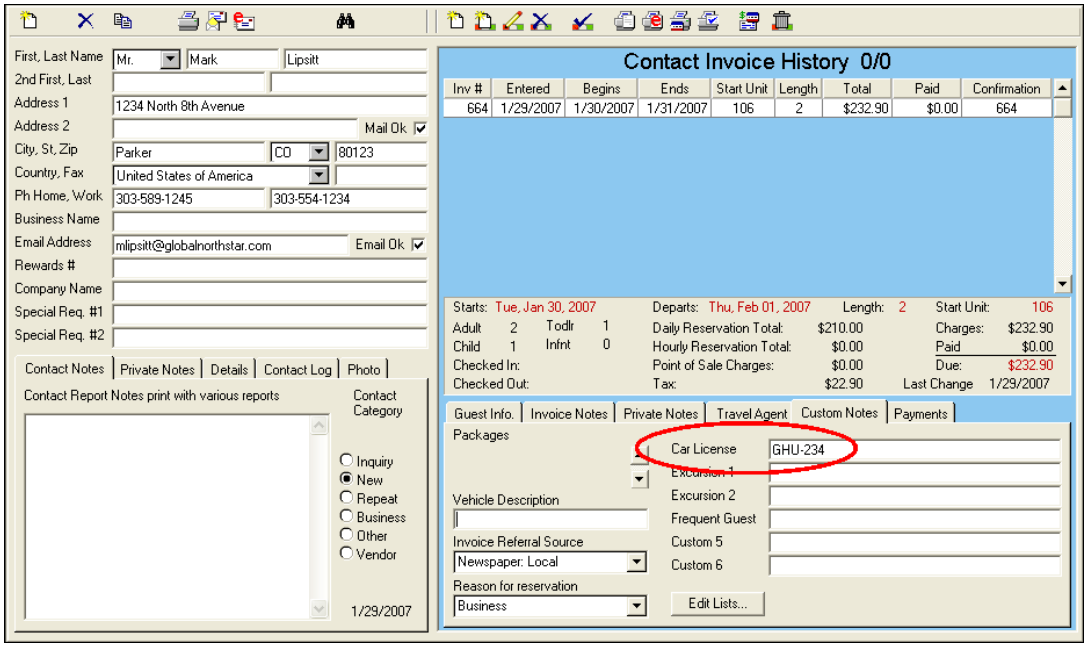

If online guests should provide information captured in user defined fields (i.e. – Car License #) when they make their reservation, user defined fields can be defined in the RezStream Booking Engine Online Administrative Interface.


User Defined Fields
NEW USER DEFINED FIELD
Display Label
Car License
Required Field
In order to download data into a specific user field in the desktop software, the display label must match the label in the desktop exactly.
Available User Defined Fields
Currently Active Fields (6 max)

Once user defined fields are defined in the RezStream Booking Engine Online Administrative Interface, they display on the RezStream Booking Engine's Guest Information page. This page is displayed to the online guest while booking a reservation and is where the online guest enters personal information. In the example below, the user defined field "Car License" is included on the Guest Information page.

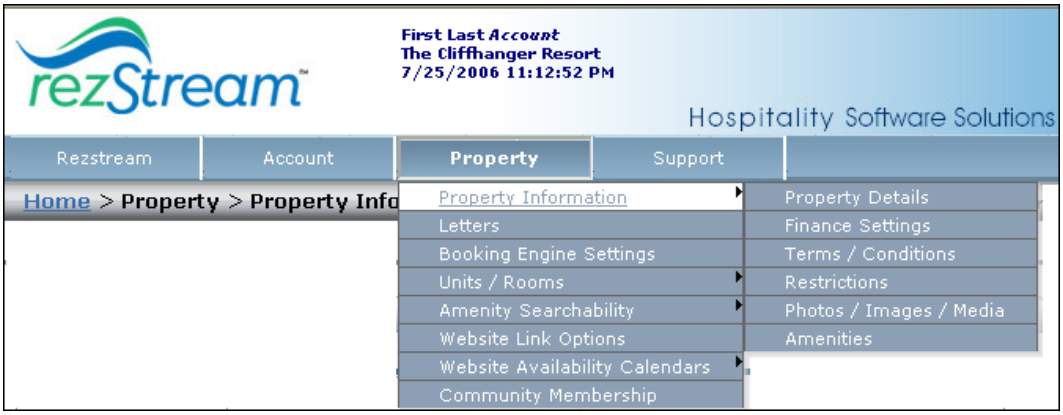



The information entered in the RezStream Booking Engine user defined field (Car License) is transferred to RezStream Professional and displayed on the Contact Data screen.



# PROPERTY SETUP

The Property drop-down menu is accessed by logging in to the RezStream Booking Engine Online Administrative Interface and pointing your mouse at the text "Property" in the top navigation toolbar.




RezStream Professional uploads **minimal** information for Property setup to the RezStream Booking Engine Online Administrative Interface.

***The headings below represent Property setup information that was NOT uploaded from RezStream Professional. This information will need to be entered directly into the RezStream Booking Engine Online Administrative Interface. Optional steps are marked accordingly.***

## PROPERTY INFORMATION > PROPERTY DETAILS

The Property Details form is accessed by clicking Property Information > Property Details. All of the information in the Property Details form is uploaded from RezStream Professional except:

1. Primary Contact – Typically the property's owner.
2. Secondary Contact – One of the property's managers.
3. BCC Email – Used only if you would like to blind carbon copy someone on every guest confirmation.
4. Detailed Property Description – Used only by companies that manage multiple properties. This description is used to describe the property to the online guest.
5. Property Photo
6. Property Logo

## PROPERTY INFORMATION > FINANCE SETTINGS

Specify the billing contact name, address, and credit card that will be used to pay RezStream Booking Engine commissions.

## PROPERTY INFORMATION > TERMS/CONDITIONS (OPTIONAL)

Enter the terms and conditions that the online guest agrees to by booking a reservation.

## PROPERTY INFORMATION > RESTRICTIONS (OPTIONAL)

Enter any restrictions that the guest should know about prior to booking the reservation such as pet policies or whether the property allows smoking.

## LETTERS

The "No Payment" and "Payment in Full" guest confirmation letters are defined in RezStream Professional and uploaded to the RezStream Booking Engine. Review these letters and make a note if changes will be made for online use. Editing letters for online use will be discussed in this guide during Property setup.

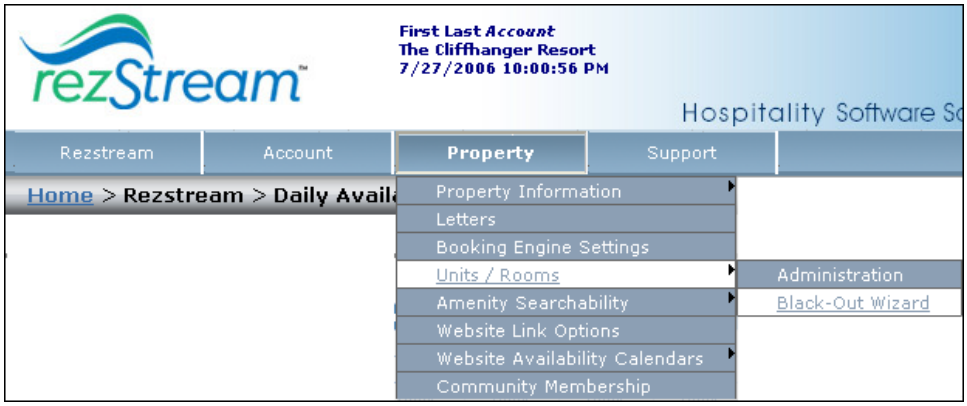
## BOOKING ENGINE SETTINGS

The answers to these types of questions will need to be organized prior to completing the Booking Engine Settings section.

1. How should the RezStream Booking Engine react if a guest's credit card is declined?
2. What types of credit cards are accepted at the property?
3. What are the property's requirements for online deposits?
4. What if the guest searches for a room and encounters sold out dates?
5. Should the guest be required to enter a reservation source and/or reason?
6. What terms and conditions does the guest agree to by making an online reservation?
7. Should online guests be able to purchase POS Items via the RezStream Booking Engine?
8. Should the RezStream Booking Engine be configured to match the property's marketing website "look and feel"?

## UNITS/ROOMS > BLACK-OUT WIZARD (OPTIONAL)

If certain units are not available for reservations via the RezStream Booking Engine, use this link for defining the unit(s) and the start/end dates in which they are not available. In addition, a description can be added detailing why the unit is not available.




## WEBSITE LINK OPTIONS

How should the hyperlink to the RezStream Booking Engine be displayed on the property's marketing website? You will choose from three default hyperlink options or specify any image and/or text to hyperlink from your property's website to the RezStream Booking Engine.

***Now that you have organized your property's data for Account and Property setup, we will begin configuring the RezStream Booking Engine.***

# 5. COMPLETE ACCOUNT SETUP

RezStream Booking Engine Account setup is organized into the following categories:

1. Account Information
    a. Details
    b. Users
    c. Photos/Images/Media
    d. Amenities
    e. Sources
    f. Reasons
2. Taxes
    a. Tax Groups
    b. Individual Taxes
3. Point of Sale
4. Packages
5. Rate Plans/Unit Types
6. Rate Names/Rate Seasons
7. Reports
8. Statistics/Tracking
9. User Defined Fields

A majority of the Account setup information is uploaded directly from RezStream Professional, including:

1a. Account Information > Details (other than Primary & Secondary Contact)
1e. Sources
1f. Reasons
2. Taxes
3. Point of Sale
4. Packages
5. Rate Plans/Unit Types
6. Rate Names/Rate Seasons

This section will review each Account setup option and the information that is uploaded **automatically** from RezStream Professional. In addition, it will provide steps for completing the setup options that are NOT uploaded directly from RezStream Professional, including:

1c. Photos/Images/Media (Optional)
1d. Amenities (Optional)
9. User Defined Fields (Optional)

***It is important to note that any information that is shared between RezStream Professional and the RezStream Booking Engine must be maintained in RezStream Professional. Information that is updated in the RezStream Booking Engine Online Administrative Interface will NOT be transferred back to RezStream Professional.***

***This section will take you through the Account setup menu for our sample property. The Account menu is organized in the order in which forms should be completed, beginning with all sections in Account Information and ending with User Defined Fields.***

# ACCOUNT INFORMATION

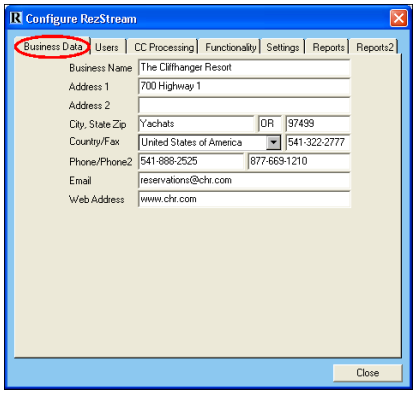
The Account > Account Information link contains headings for Details, Users, Photos/Images/Media, Amenities, Sources, and Reasons. Each of these links is described in the sections below.

## DETAILS

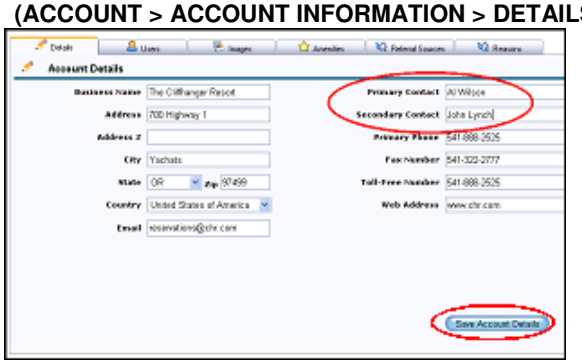
Standard contact information is stored in the Account Details form. The Account Details form is accessed by logging into the RezStream Booking Engine Online Administrative Interface and clicking the Account > Account Information > Details link.

Besides the primary and secondary contact fields, all other Account Details are uploaded to the RezStream Booking Engine from data previously entered into RezStream Professional's Business Data screen.

**REZSTREAM PROFESSIONAL (TOOLS > CONFIGURE > BUSINESS DATA)**




**REZSTREAM BOOKING ENGINE (ACCOUNT > ACCOUNT INFORMATION > DETAILS)**




In this step, you will only need to enter a primary and secondary contact. Normally, the property's owner or General Manager is entered as the primary contact. One of the property's managers is usually entered as a secondary contact.

***Click the "Save Account Details" button after entering a primary and secondary contact.***

***Any changes to business data (other than contact information) MUST be made through RezStream Professional. After making changes to business data in RezStream Professional, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

# USERS

Create a new user profile for each employee that will use the RezStream Booking Engine Online Administrative Interface. Multiple users with similar or different account permission settings can access the administrative interface. Permission level settings or roles grant full or limited access to key property information such as unit rates and policies.

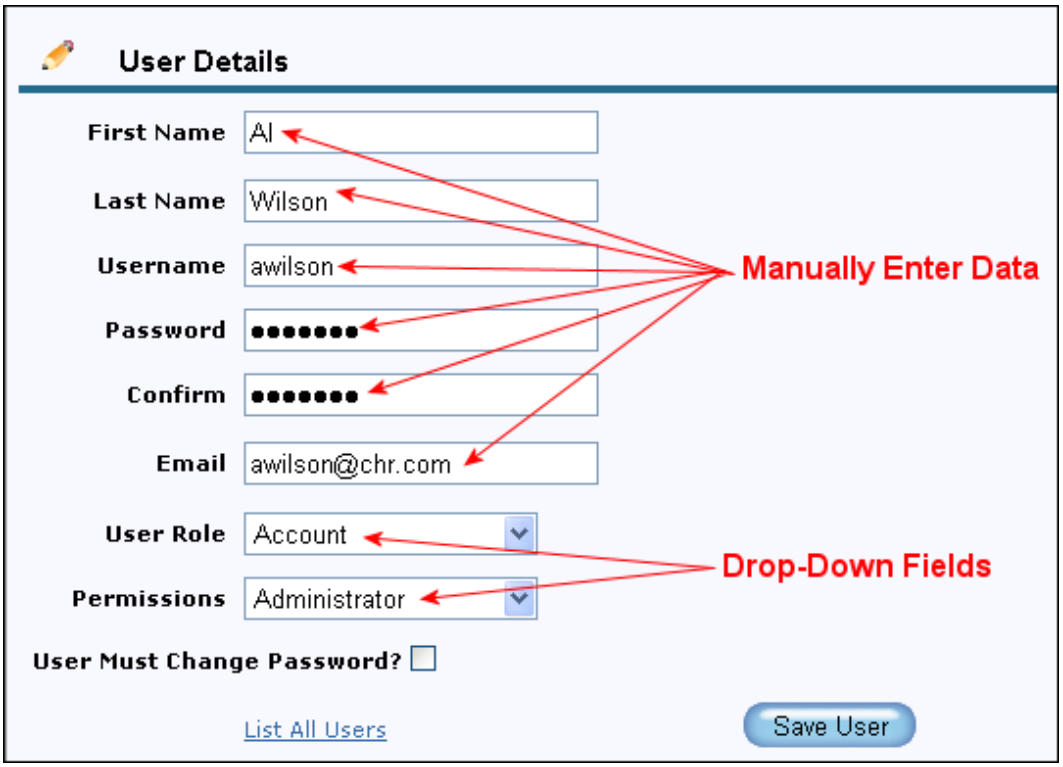
From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Users link. The Account Administration > Users form is displayed.

In this example, two users, Al Wilson and John Lynch, will be added. The information for these two users is listed below.

1. Al Wilson
    a. User Display Name – Al Wilson
    b. User Role – Account
    c. Username - awilson
    d. Password – govols
    e. Email – awilson@chr.com
2. John Lynch
    a. User Display Name – John Lynch
    b. User Role - Account
    c. Username – jlynch
    d. Password – gobucs
    e. Email – jlynch@chr.com

## *Creating New Users*

From the Users form, click the Create New User button. A blank User Details form is displayed. Complete the form for Al Wilson with the information previously listed.

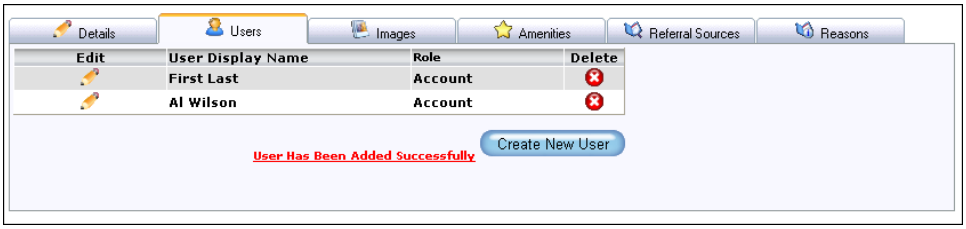



A description of each field in the User Details form is included in the following table.

| FIELD | DESCRIPTION |
|---|---|
| First Name | Enter the user's first name. |
| Last Name | Enter the user's last name. |
| Username | Enter a unique name that this user will use when logging into the RezStream Booking Engine Online Administrative Interface. |
| Password | Enter the password the person will use when logging into the RezStream Booking Engine Online Administrative Interface. |
| Confirm | Enter the password a second time. |
| Email | Enter the user's email address. |
| User Role | If the user should have access to the Account menu, set the user role to Account. To restrict the user from seeing the Account menu, set the user role to Property. |
| Permissions | Users with Administrator permissions are allowed to add other users. |
| User Must Change Password? | If this box is checked, the user must change their password the first time they login to the RezStream Booking Engine Online Administrative Interface. |

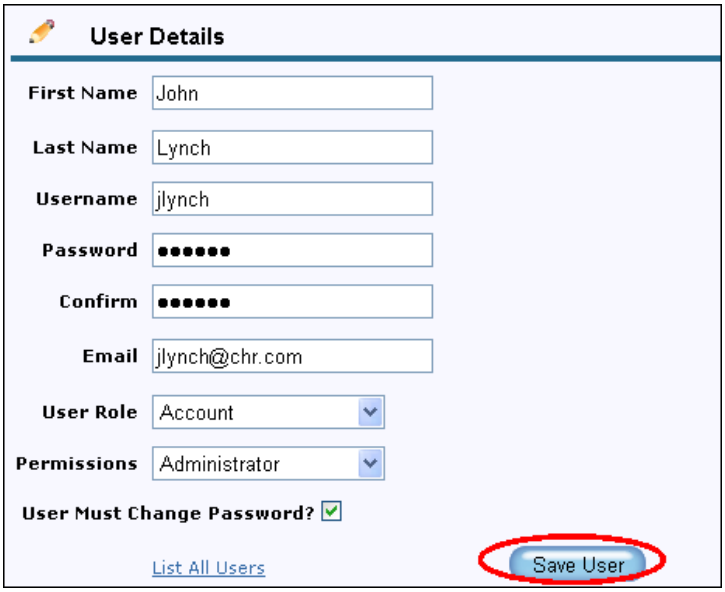
***Click the Save User button after completing this form!***

After adding Al Wilson to the list of users, the Users form is updated with the grid of active users.




Next, click the Create New User button to add John Lynch.

Complete the User Details form for John Lynch.

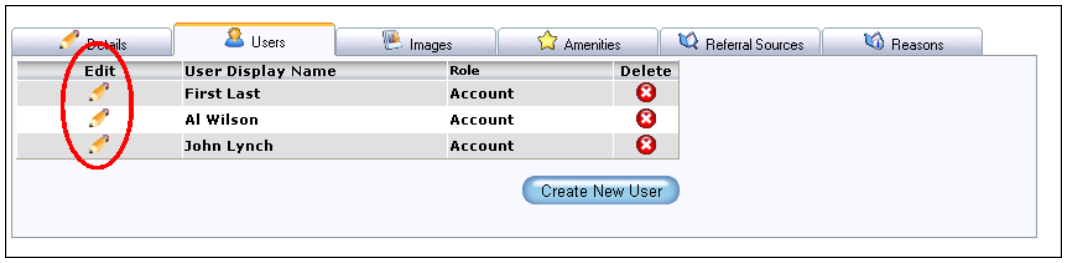



Always click the Save User button after completing the User Details form for a new user.

Once John Lynch is added to the database, his user name is displayed on the Users form along with a message confirming the addition of the new user.

## *Edit an Existing User's Profile*

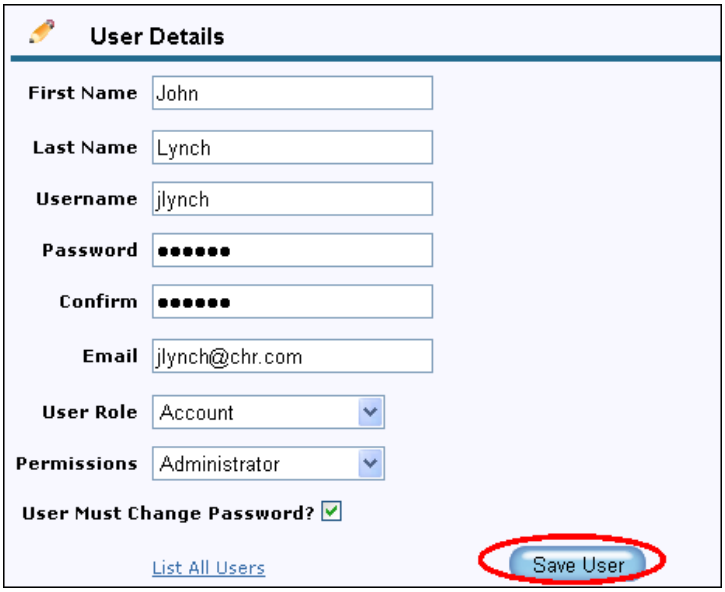
If information added to a user profile needs to be updated, click the Account > Account Information > Users link. The Account Administration > Users form is displayed.




Click the edit icon ( ) for changing user information. The following fields can be changed after a user profile has been created.

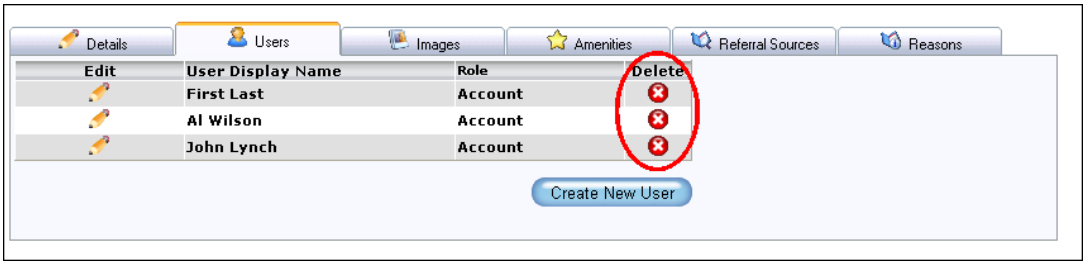
- First Name
- Last Name
- Username
- Password
- Email
- User Role
- Permissions
- User Must Change Password

Clicking the edit icon displays the User Details form where changes can be made to the user's profile. To make a change to an existing user profile, move the cursor to any field in the User Details form and make the appropriate changes. Remember to choose from the drop-down list for user role and permissions categories. Once any changes are made, click the Save User button.

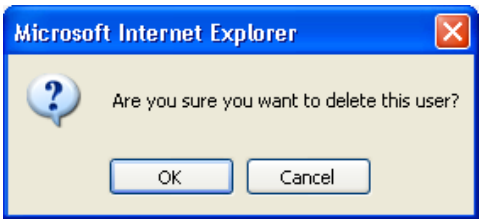


### *Delete an Existing User*

If Al Wilson or John Lynch were to leave the property or no longer needed access to the RezStream Booking Engine Online Administrative Interface, their accounts would be deleted by accessing the Account > Account Information > Users link. The Users form is displayed.




Click the delete icon ( ) to the right of the user's name. The system displays the following prompt.




Click OK to delete the user. An updated Users form is displayed.

## PHOTOS/IMAGES/MEDIA (OPTIONAL)

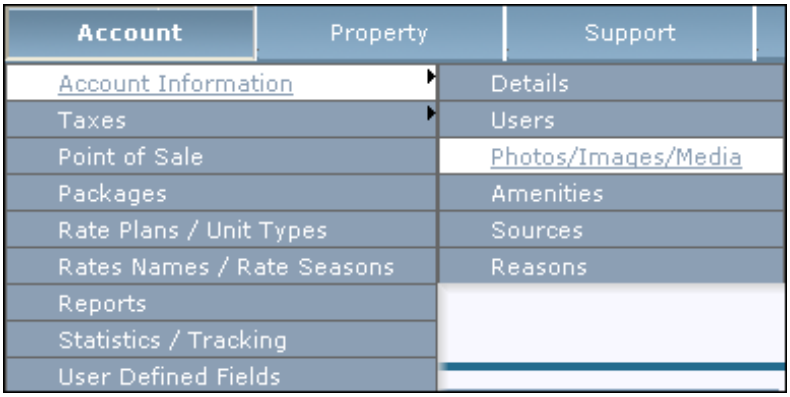
Images are NOT uploaded to the RezStream Booking Engine from RezStream Professional. Images can be used to entice Internet guests to book reservations at your property. Images are uploaded directly to the RezStream Booking Engine and assigned to one of the image categories listed in the table below.

| CATEGORY | DESCRIPTION |
|---|---|
| NoCategory | A photo that has been uploaded, but not currently in use. |
| PropertyOnly | A photo of the property, a room type, or a common guest area. |
| UnitOnly | A photo of a specific accommodation. |
| PointofSaleOnly | A photo of a point of sale item. |

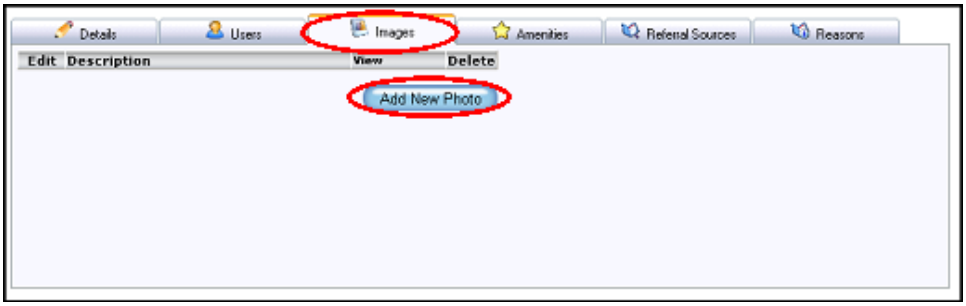
***Prior to uploading photos, the photos must be digitized and saved as .jpg or .gif files.***

Use the following steps to upload images in the RezStream Booking Engine Online Administrative Interface.

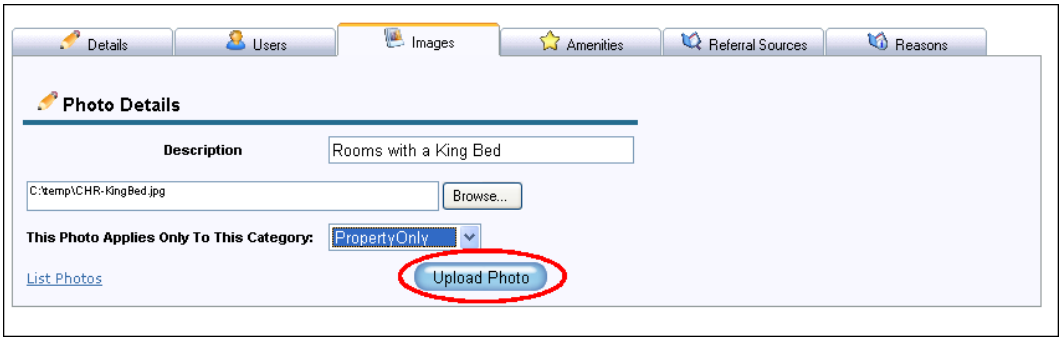
1. Click the Account > Account Information > Photos/Images/Media link.




2. From the Account Administration > Images tab, click the Add New Photo button.

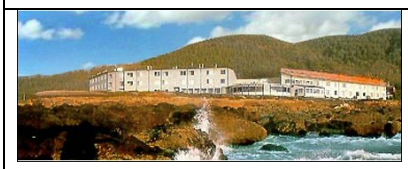
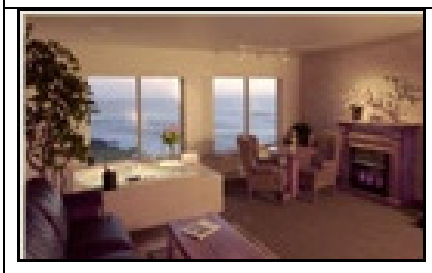



3. The Photo Details form is displayed. Enter a description for the image and click the Browse button to locate the image on your local drive or network. Use the "This Photo Applies Only to This Category" drop-down field to specify a photo category (NoCategory, PropertyOnly, UnitOnly, or PointofSaleOnly) from the list.




4. Click the Upload Photo button.

Our sample property will upload the images displayed in the table on the following page. These photos help guests become familiar with the property and its various unit types (King, Queen Queen, and Suite).

| IMAGE | DESCRIPTION | IMAGE CATEGORY |
|---|---|---|
| | Pool Deck View | PropertyOnly |
|  | Seaside View | PropertyOnly |
| | Fine Dining | PropertyOnly |
| | Rooms with a King Bed | UnitOnly |
|  | Rooms with Two Queen Beds | UnitOnly |
| | Suites | UnitOnly |

| IMAGE | DESCRIPTION | IMAGE CATEGORY |
|---|---|---|
| | Property Logo | PropertyOnly |

## *Edit an Existing Photo*

Once a photo has been uploaded to the RezStream Booking Engine, the Images form can be used to change the following fields.

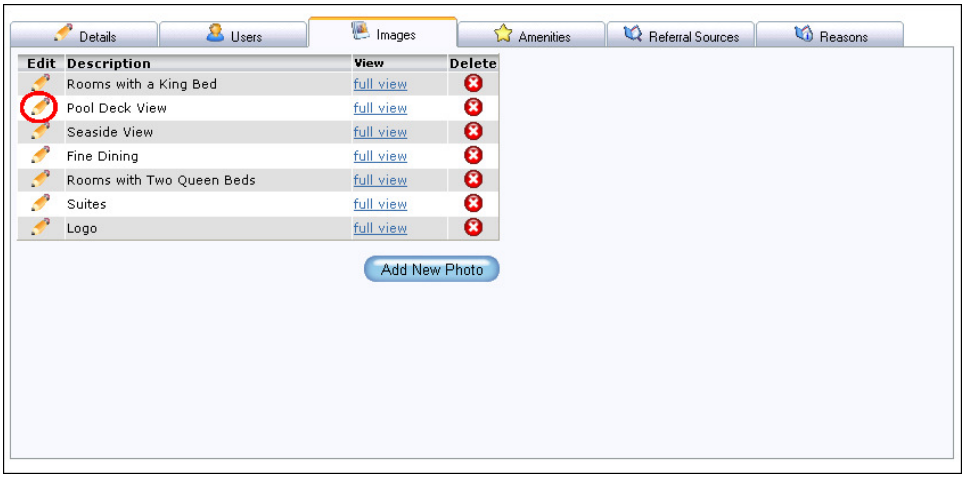
1. Description
2. Category

While it may not be a common task, there may be an occasion where a property wants to update the description used to describe a photo that has been uploaded to the RezStream Booking Engine Online Administrative Interface. To change the description for the "Pool Deck View," use the following steps.

1. From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Photos/Images/Media link.

2. The Images form is displayed which includes a grid that lists all existing photos.

   Click the edit icon ( ) that corresponds to the "Pool Deck View" photo.




3. The Photo Details form is displayed. Update the description field as desired.

## *Delete an Existing Photo*

Use the following steps for deleting a photo that has been uploaded to the RezStream Booking Engine.

1. From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Photos/Images/Media link.

2. The Account Administration > Images form is displayed which includes a grid that lists all existing uploaded photos. Click the delete icon ( ) that corresponds to the appropriate photo to be deleted.

### *View Existing Photos*

To view existing photos from the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Photos/Images/Media link. The Account Administration > Images form is displayed which contains a grid that lists all existing uploaded photos.

## AMENITIES (OPTIONAL)

Amenities are **NOT** uploaded from RezStream Professional to the RezStream Booking Engine. In the RezStream Booking Engine, amenities can be used by Internet guests when searching for rooms or for describing the property as a whole. Amenities that help guests search for rooms are called searchable amenities.

For example, an Internet guest at a beachfront property may be looking for a room with an "Ocean View." In this example, the term "Ocean View" is a searchable unit level amenity that will allow a guest to find accommodations with an "Ocean View."

Amenities that describe the property as a whole are known as standard amenities. An example of a standard amenity is a hotel's pool as all guests have access to this amenity.

The following table lists standard and unit level amenities at our sample property.

| PROPERTY LEVEL AMENITIES | UNIT LEVEL AMENITIES |
|---|---|
| Heated Pool | Jacuzzi Tub |
| Full Service Spa | Private Balcony |
| Exercise Room | King Bed |
| | Ocean View |
| | Handicap Accessible |
| | Non-Smoking |

***All amenities are defined in the RezStream Booking Engine Online Administrative Interface Account setup menu. They are flagged as searchable or non-searchable during Property setup.***

### *Add a New Amenity*

Unit level amenities can be flagged as sortable or non-sortable. Sortable amenities are displayed when guests enter their arrival and departure dates in the RezStream Booking Engine. While non-sortable unit level amenities do not appear while guests are searching for accommodations, they can be included in the available rooms listing when a guest is selecting an accommodation.

Based on the information in the preceding table, the following amenities will be defined for our sample property.

Property level (standard) amenities:

- Heated Pool
- Full Service Spa
- Exercise Room

Sortable unit level amenities:

- Jacuzzi Tub
- King Bed
- Ocean View
- Non-Smoking Room

Unit level amenities that will not be flagged as sortable:

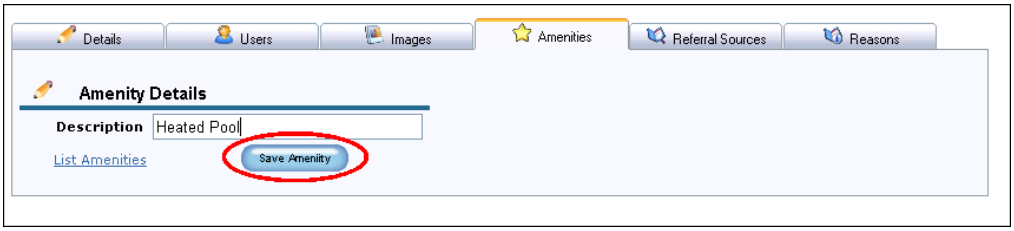
- Private Balcony
- Handicap Accessible

Use the following steps for adding a new amenity that will later be assigned to either the property as a whole or a specific unit.

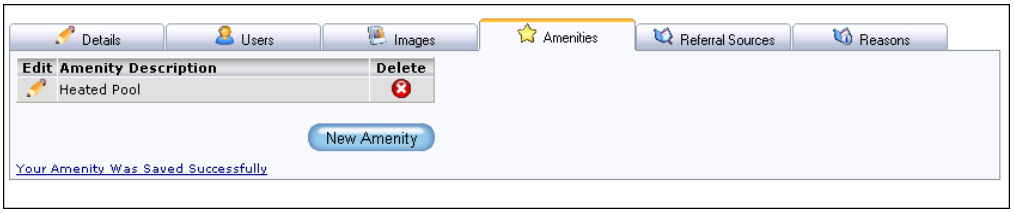
1. In the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Amenities link.

2. The Account Administration > Amenities form is displayed. Click the New Amenity button.

3. The Amenity Details form is displayed. Enter a description for the amenity and click the Save Amenity button.

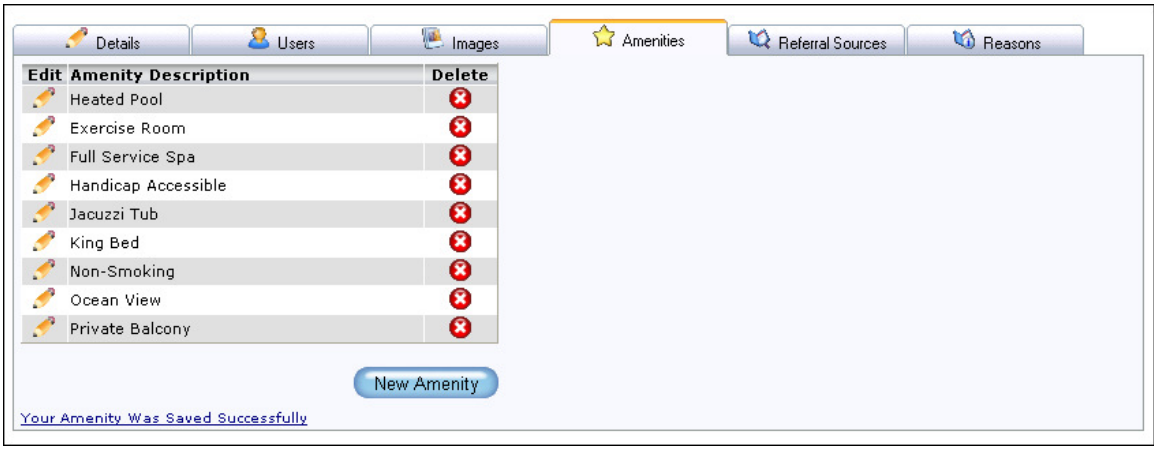



4. The new amenity is displayed in the amenity grid.




5. To add the next amenity, click the New Amenity button and repeat step 3.

After adding all of the sample property's amenities, the grid appears similar to the following image.

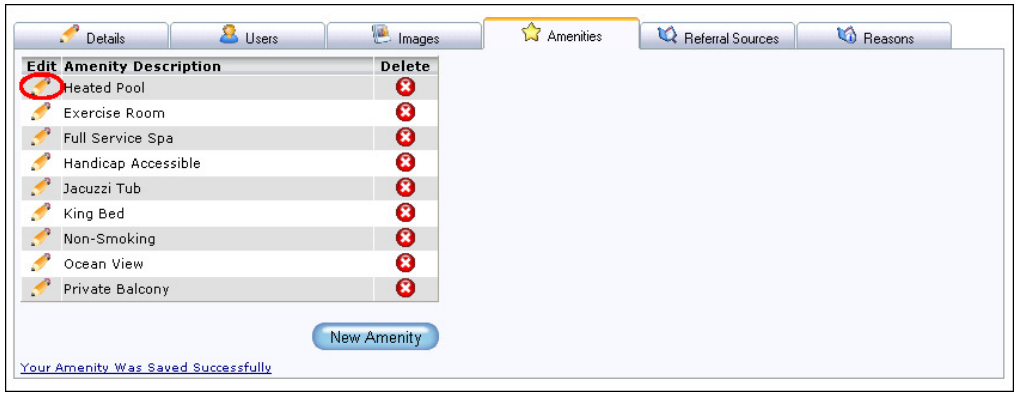


## *Edit an Existing Amenity*

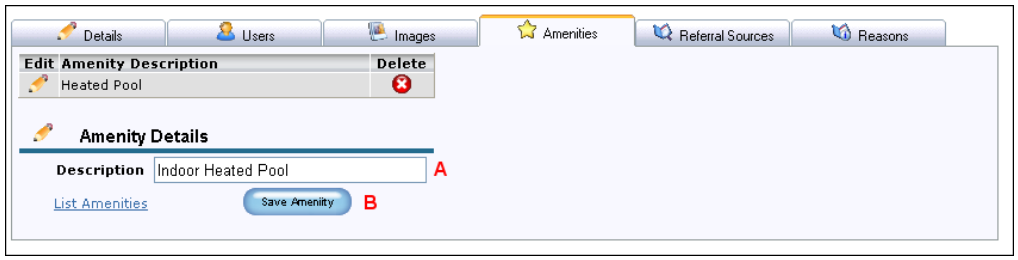
After an amenity has been added, the only field that can be changed is the amenity description. In our example, the General Manager has decided to change the "Heated Pool" amenity to "Indoor Heated Pool" to market the fact that guests can use the pool at any time of the year. Use the following steps for making this change.

1. From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Amenities link.

2. The Account Administration > Amenities form is displayed. The form includes a grid that lists every existing amenity. Click the edit icon ( ) that corresponds to the "Heated Pool" amenity.




3. The Amenity Details form is displayed. Update the amenity's description (A) and click the Save Amenity button (B).

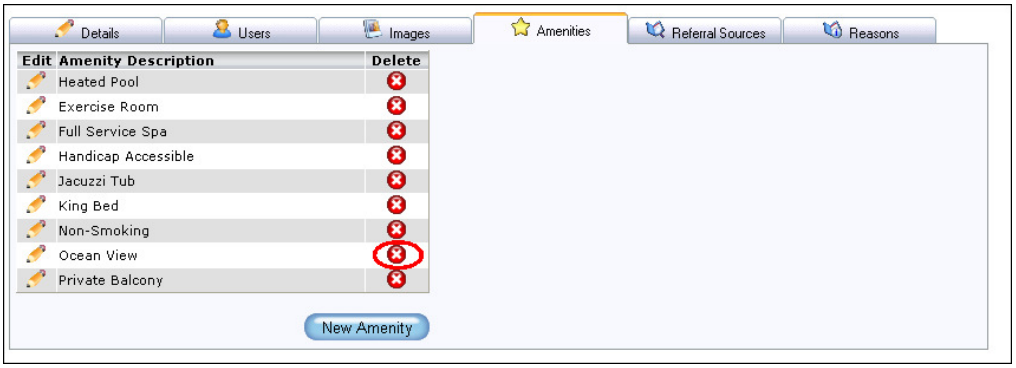


## *Delete an Existing Amenity*

Use the following steps for deleting an existing amenity. For example, let's assume that the sample property has recently completed a remodel that made it possible to advertise all of their rooms as having "Ocean Views." In this example, "Ocean View" as a unique amenity can be deleted from the RezStream Booking Engine using the following steps.

1. From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Amenities link.

2. The Account Administration > Amenities form is displayed. The form includes a grid that lists every existing amenity. Click the delete icon ( ) that corresponds to the "Ocean View" amenity.




3. The system displays a confirmation message. Click OK to delete this amenity.

## *View Existing Amenities*

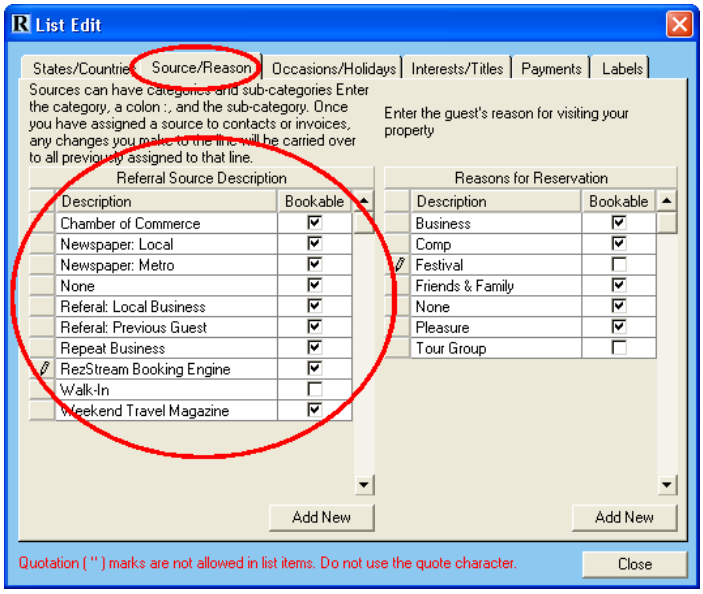
To view existing amenities, use the following steps.

1. From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Amenities link.

2. The Account Administration > Amenities form is displayed. This form includes a grid that lists each existing amenity. Amenities are displayed in the order they were created.

# SOURCES

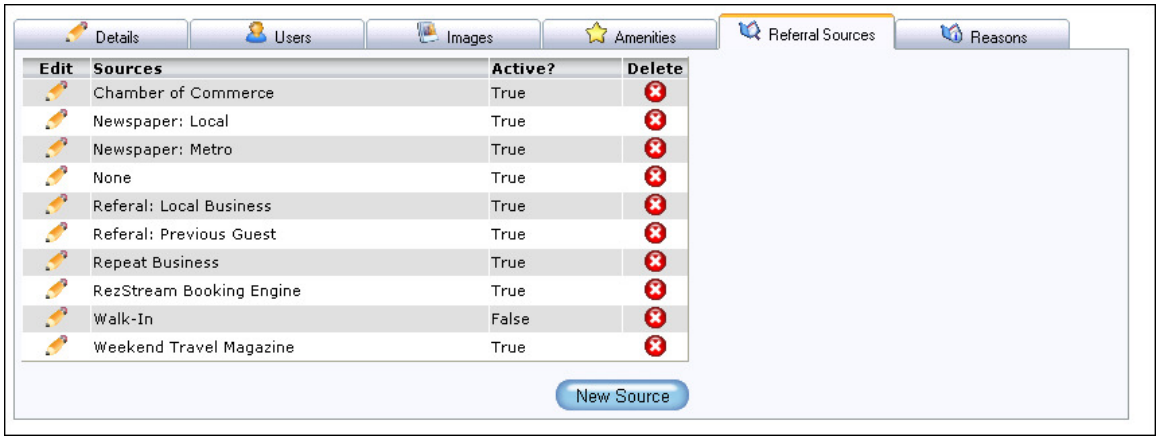
Referral sources are defined in RezStream Professional by clicking Tools > List Edit and selecting the Source/Reason tab.




Entering a checkmark in the Bookable column makes the referral source available when guests book accommodations through the RezStream Booking Engine.

Referral sources defined in RezStream Professional and marked as Bookable are uploaded to the RezStream Booking Engine via the configuration upload.

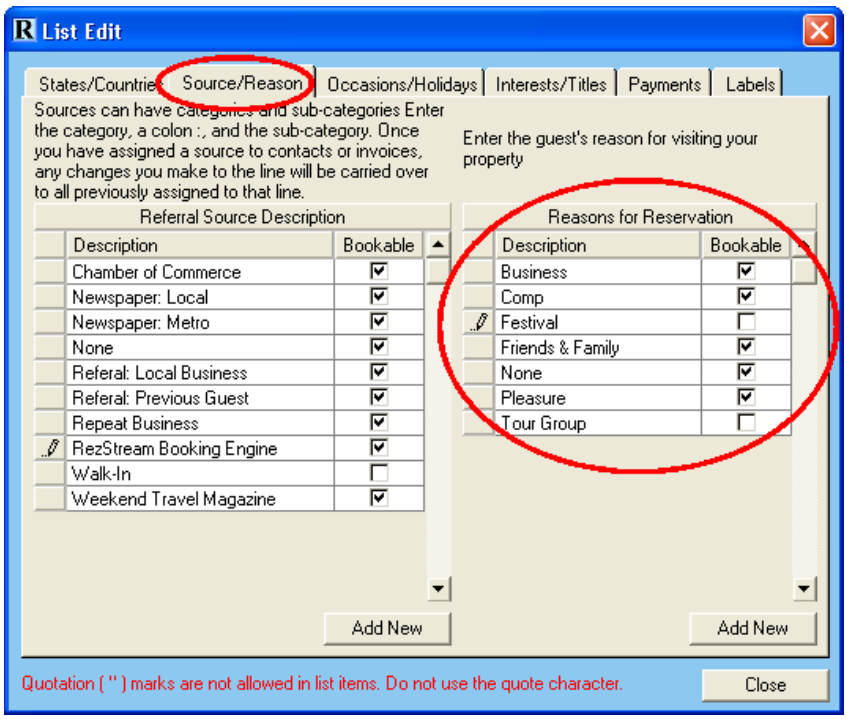
From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Sources link to view referral sources uploaded from RezStream Professional.




***Any changes to referral sources MUST be made through RezStream Professional. After making changes to referral sources, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

# REASONS

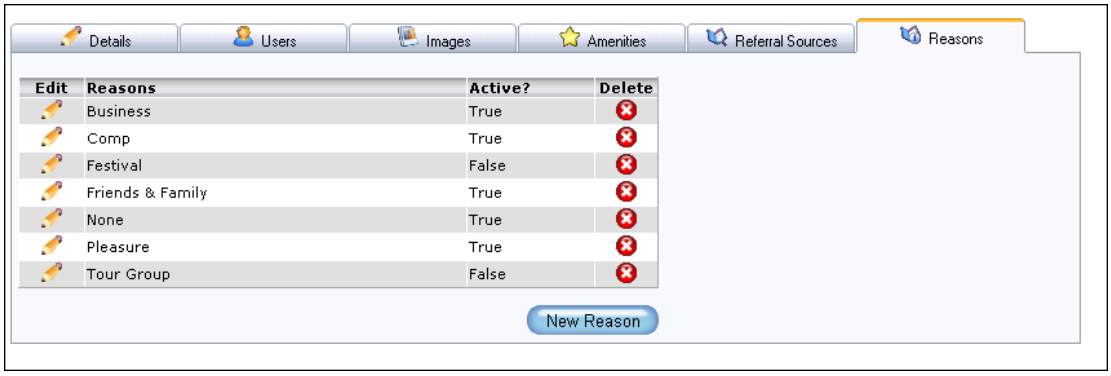
The reasons for reservation list is defined in RezStream Professional by clicking Tools > List Edit and selecting the Source/Reason tab.




Entering a checkmark in the Bookable column makes the reason for reservation available when guests book accommodations through the RezStream Booking Engine.

The reasons for reservation list defined in RezStream Professional is uploaded to the RezStream Booking Engine via the configuration upload.

From the RezStream Booking Engine Online Administrative Interface, click the Account > Account Information > Reasons link for viewing reasons for reservation.



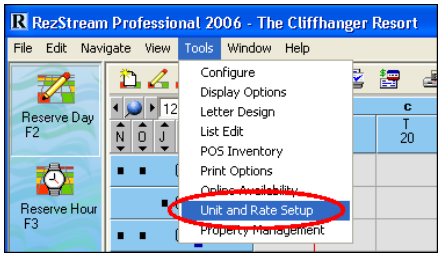

***Any changes to the reasons for reservation list MUST be made through RezStream Professional. After making changes to the reasons for reservation list, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

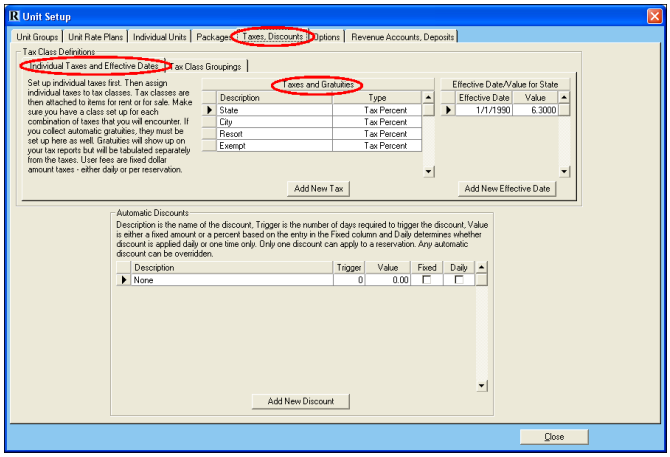
# TAXES

Both individual taxes and tax class groupings are uploaded from RezStream Professional to the RezStream Booking Engine Online Administrative Interface. The sections below describe the tax information that is uploaded in this process.

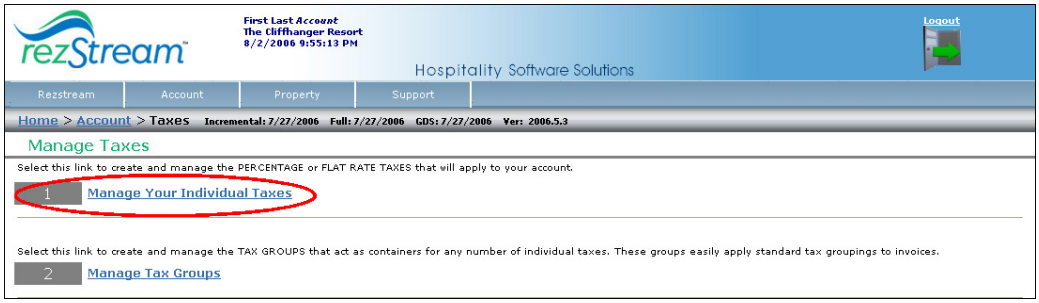
## INDIVIDUAL TAXES

Individual taxes are defined in RezStream Professional by clicking Tools > Unit and Rate Setup and selecting the Taxes, Discounts tab. The individual taxes defined in the Taxes and Gratuities table are uploaded to the RezStream Booking Engine.

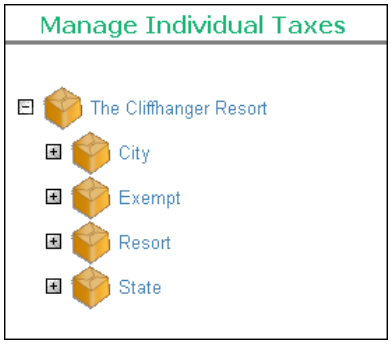


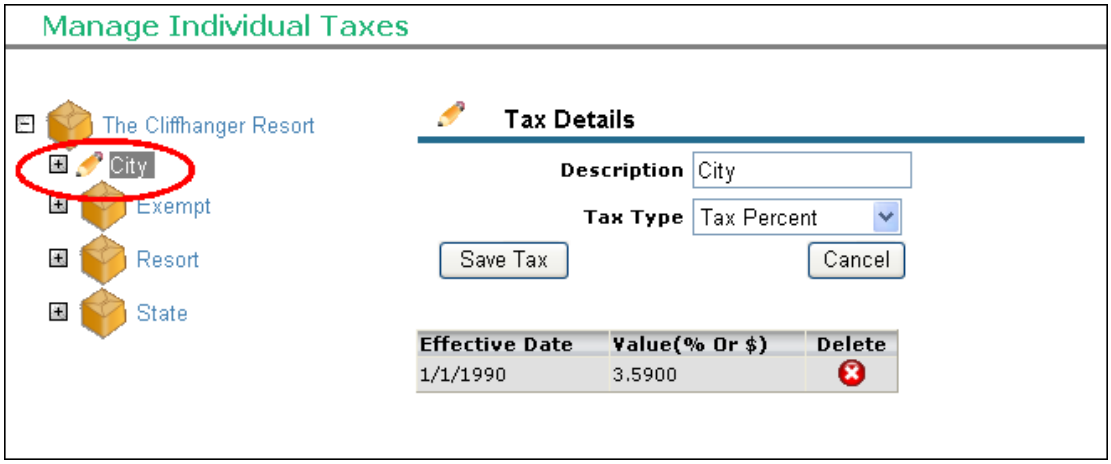

Once uploaded, individual taxes can be viewed in the RezStream Booking Engine Online Administrative Interface by clicking the Account > Taxes > Manage Taxes > Manage Your Individual Taxes link.


rezStream
First Last Account
The Cliffhanger Resort
8/2/2006 9:55:13 PM
Logout
Hospitality Software Solutions
Rezstream
Account
Property
Support
Home > Account > Taxes
Incremental: 7/27/2006 Full: 7/27/2006 GDS: 7/27/2006 Ver: 2006.5.3
Manage Taxes
Select this link to create and manage the PERCENTAGE or FLAT RATE TAXES that will apply to your account.
1 Manage Your Individual Taxes
Select this link to create and manage the TAX GROUPS that act as containers for any number of individual taxes. These groups easily apply standard tax groupings to invoices.
2 Manage Tax Groups

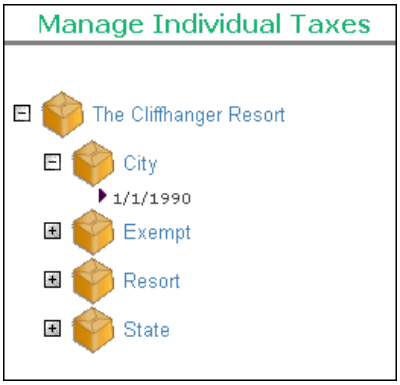
After clicking the Manage Your Individual Taxes link, the Manage Individual Taxes form is displayed. Here, the individual taxes uploaded from RezStream Professional are listed.




To view the Tax Details form associated with a specific tax, click the individual tax name.



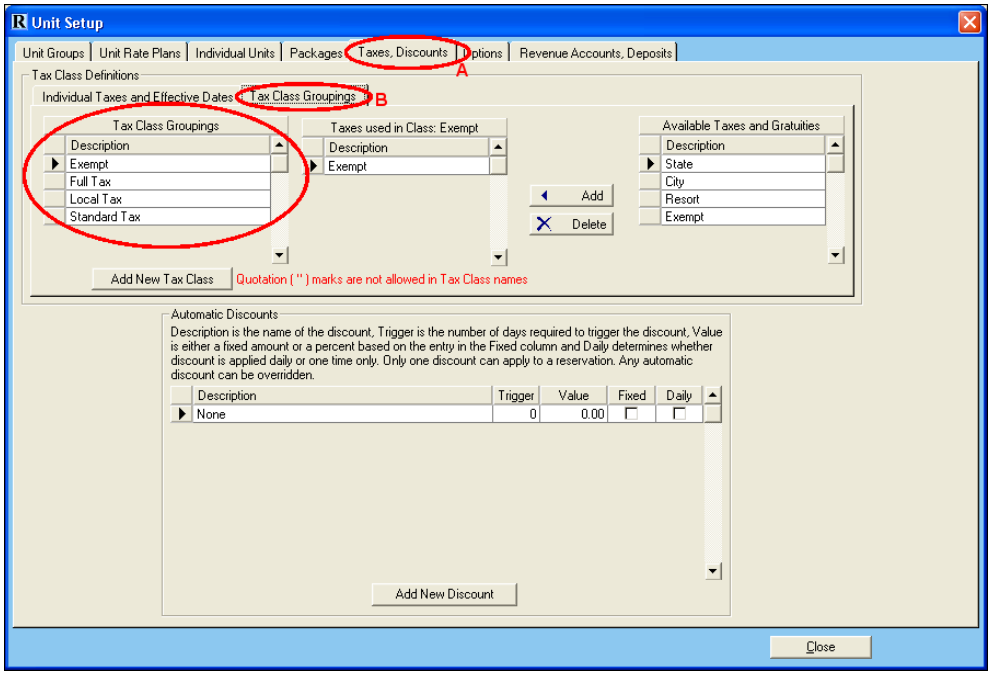

To view tax seasons, click the "+" to the left of an individual tax.



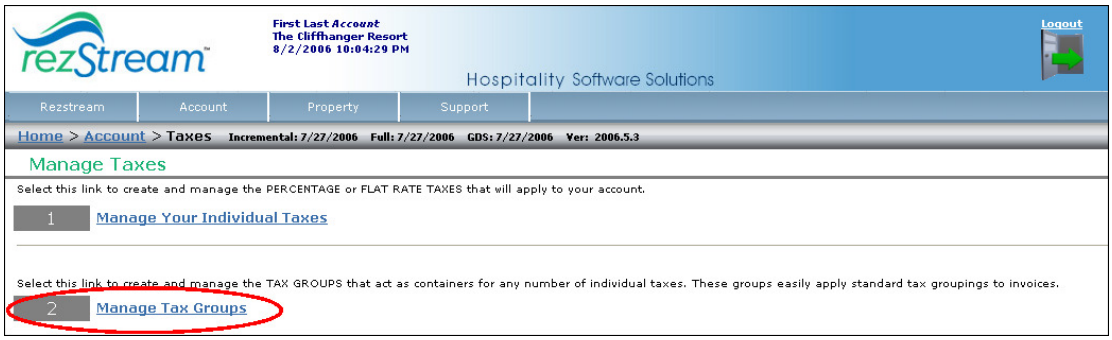

***There is not an action item to complete in this step. Simply confirm that the individual taxes uploaded from RezStream Professional to the RezStream Booking Engine are displayed correctly.***

# TAX GROUPS (TAX CLASS GROUPINGS)

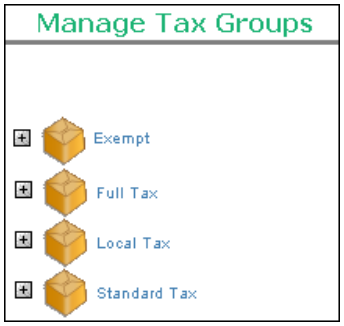
RezStream Professional combines individual taxes into tax class groupings. Tax class groupings (referred to as tax groups in the RezStream Booking Engine) are managed in RezStream Professional by clicking Tools > Unit Rate and Setup > Taxes, Discounts. After selecting the Taxes, Discounts tab (A), click the Tax Class Groupings tab (B).



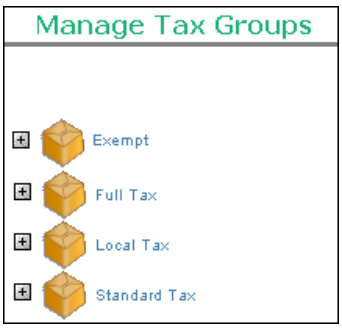

Once uploaded, tax class groupings can be viewed in the RezStream Booking Engine Online Administrative Interface by clicking the Account > Taxes > Manage Taxes > Manage Tax Groups link.

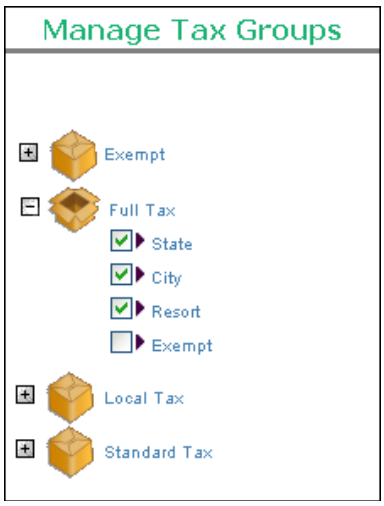

rezStream
First Last Account
The Cliffhanger Resort
8/2/2006 10:04:29 PM
Hospitality Software Solutions
Logout
Rezstream
Account
Property
Support
Home > Account > Taxes Incremental: 7/27/2006 Full: 7/27/2006 GDS: 7/27/2006 Ver: 2006.5.3
Manage Taxes
Select this link to create and manage the PERCENTAGE or FLAT RATE TAXES that will apply to your account.
1
Manage Your Individual Taxes
Select this link to create and manage the TAX GROUPS that act as containers for any number of individual taxes. These groups easily apply standard tax groupings to invoices.
2
Manage Tax Groups

After clicking the Manage Tax Groups link, the Manage Tax Groups form is displayed. Here, tax class groupings (tax groups) uploaded from RezStream Professional are listed.




To view the individual taxes included in a specific tax group (tax class grouping), click the "+" to the left of a tax group name.



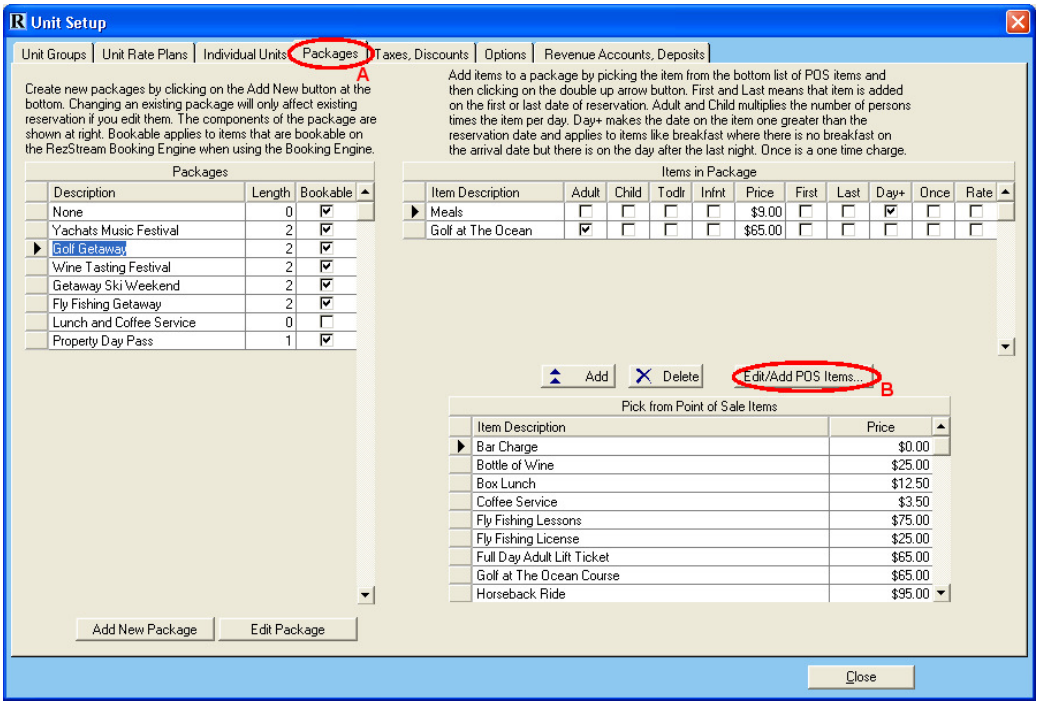




***There is not an action item to complete in this step. Simply confirm that the tax class groupings uploaded from RezStream Professional to the RezStream Booking Engine are displayed correctly.***

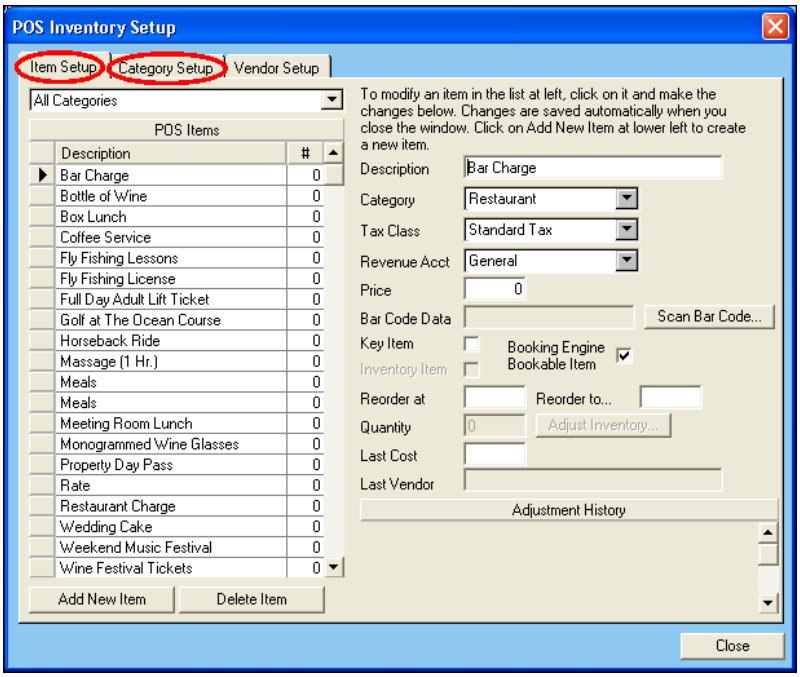
***Any changes to individual taxes or tax class groupings MUST be made through RezStream Professional. After making changes to individual taxes or tax class groupings in RezStream Professional, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

# POINT OF SALE (OPTIONAL)

Point of sale (POS) categories and items are defined in RezStream Professional by clicking Tools > Unit and Rate Setup and selecting the Packages tab (A). From the Packages window, POS categories and items are added and edited by clicking the Edit/Add POS Items button (B).

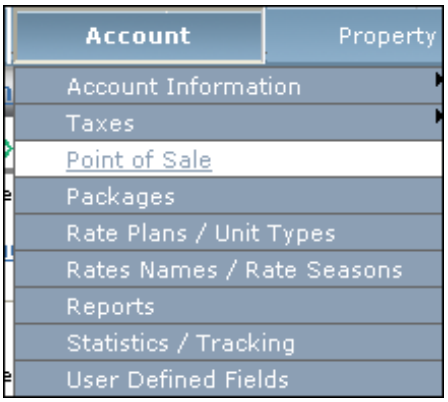

Unit Setup
Unit Groups
Unit Rate Plans
Individual Units
Packages
A
Taxes, Discounts
Options
Revenue Accounts, Deposits
Create new packages by clicking on the Add New button at the bottom. Changing an existing package will only affect existing reservation if you edit them. The components of the package are shown at right. Bookable applies to items that are bookable on the RezStream Booking Engine when using the Booking Engine.
Add items to a package by picking the item from the bottom list of POS items and then clicking on the double up arrow button. First and Last means that item is added on the first or last date of reservation. Adult and Child multiplies the number of persons times the item per day. Day+ makes the date on the item one greater than the reservation date and applies to items like breakfast where there is no breakfast on the arrival date but there is on the day after the last night. Once is a one time charge.
Packages
Description
Length
Bookable
None
Yachats Music Festival
Golf Getaway
Wine Tasting Festival
Getaway Ski Weekend
Fly Fishing Getaway
Lunch and Coffee Service
Property Day Pass
Items in Package
Item Description
Adult
Child
Todlr
Infnt
Price
First
Last
Day+
Once
Rate
Meals
$9.00
Golf at The Ocean
$65.00
Add
Delete
Edit/Add POS Items...
B
Pick from Point of Sale Items
Item Description
Price
Bar Charge
$0.00
Bottle of Wine
$25.00
Box Lunch
$12.50
Coffee Service
$3.50
Fly Fishing Lessons
$75.00
Fly Fishing License
$25.00
Full Day Adult Lift Ticket
$65.00
Golf at The Ocean Course
$65.00
Horseback Ride
$95.00
Add New Package
Edit Package
Close

After clicking the Edit/Add POS Items button, tabs are available in the POS Inventory Setup window for both POS Item Setup and POS Category Setup.

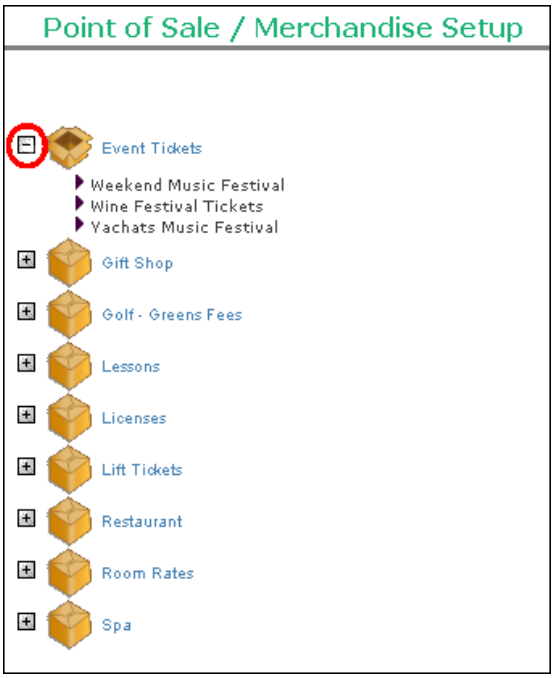


POS items with a checkmark in the "Booking Engine Bookable Item" field, along with their corresponding POS categories, were previously uploaded to the RezStream Booking Engine via the configuration upload.

POS items and categories are accessed in the RezStream Booking Engine Online Administrative Interface through the Account > Point of Sale link.

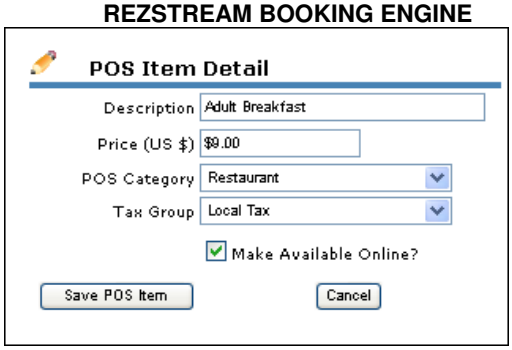



After clicking the Point of Sale link, the Point of Sale/Merchandise Setup form is displayed. Here, a list of all point of sale categories uploaded from RezStream Professional is displayed. All point of sale categories are listed along with a "+" sign. Clicking the "+" sign displays individual POS items assigned to a specific category.

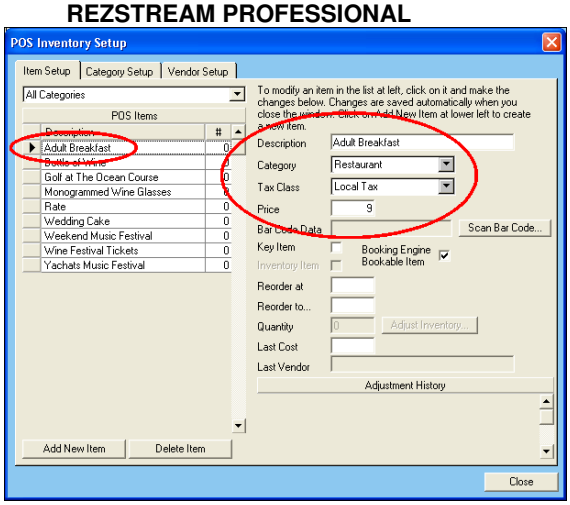


Selecting an individual POS item displays details defined in RezStream Professional and uploaded via the RezStream Booking Engine configuration process.

**REZSTREAM BOOKING ENGINE**




**REZSTREAM PROFESSIONAL**

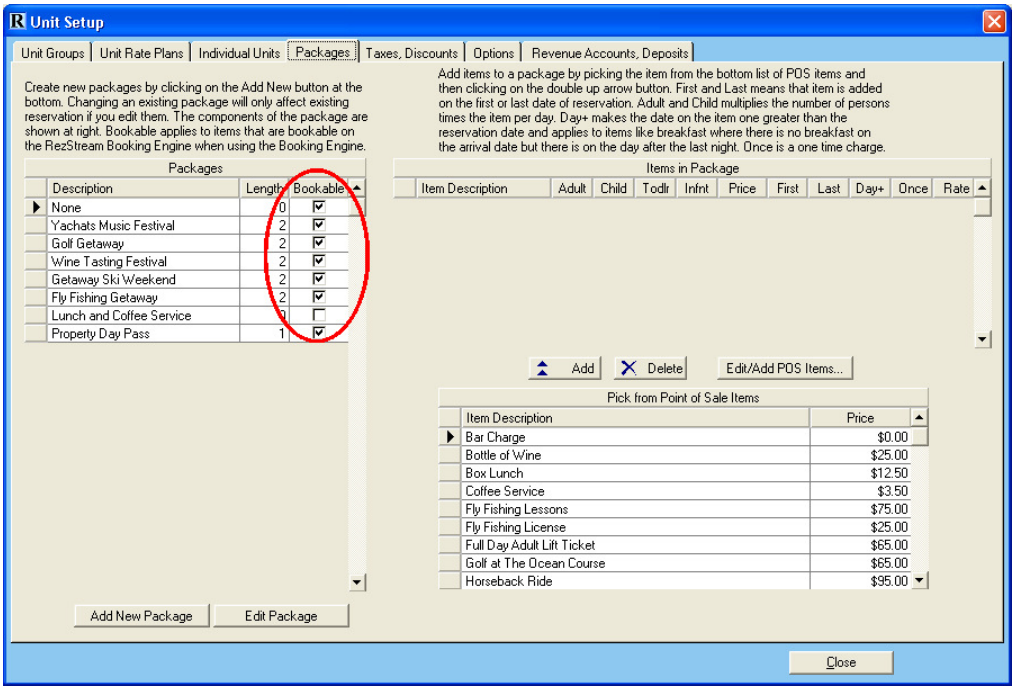



***There is not an action item to complete in this step. Simply confirm that the point of sale items and categories uploaded from RezStream Professional to the RezStream Booking Engine are displayed correctly.***

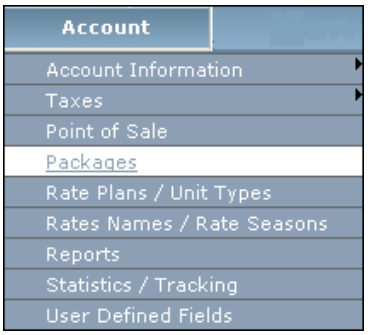
***Any changes to POS items or categories MUST be made through RezStream Professional. After making changes to POS items or categories in RezStream Professional, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

# PACKAGES (OPTIONAL)

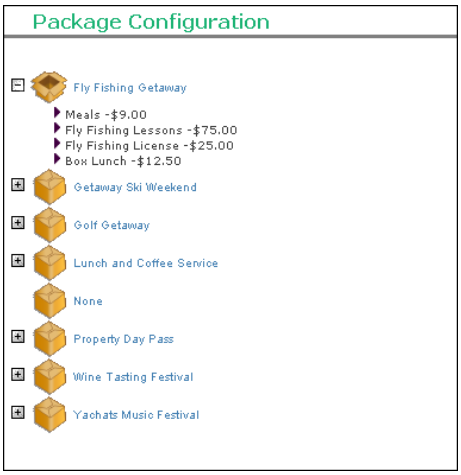
Packages that are flagged as "Bookable" in RezStream Professional are uploaded to the RezStream Booking Engine.


Unit Setup
Unit Groups
Unit Rate Plans
Individual Units
Packages
Taxes, Discounts
Options
Revenue Accounts, Deposits
Create new packages by clicking on the Add New button at the bottom. Changing an existing package will only affect existing reservation if you edit them. The components of the package are shown at right. Bookable applies to items that are bookable on the RezStream Booking Engine when using the Booking Engine.
Add items to a package by picking the item from the bottom list of POS items and then clicking on the double up arrow button. First and Last means that item is added on the first or last date of reservation. Adult and Child multiplies the number of persons times the item per day. Day+ makes the date on the item one greater than the reservation date and applies to items like breakfast where there is no breakfast on the arrival date but there is on the day after the last night. Once is a one time charge.
Packages
Description
Length
Bookable
None
Yachats Music Festival
Golf Getaway
Wine Tasting Festival
Getaway Ski Weekend
Fly Fishing Getaway
Lunch and Coffee Service
Property Day Pass
Items in Package
Item Description
Adult
Child
Todlr
Infnt
Price
First
Last
Day+
Once
Rate
Add
Delete
Edit/Add POS Items...
Pick from Point of Sale Items
Item Description
Price
Bar Charge $0.00
Bottle of Wine $25.00
Box Lunch $12.50
Coffee Service $3.50
Fly Fishing Lessons $75.00
Fly Fishing License $25.00
Full Day Adult Lift Ticket $65.00
Golf at The Ocean Course $65.00
Horseback Ride $95.00
Add New Package
Edit Package
Close

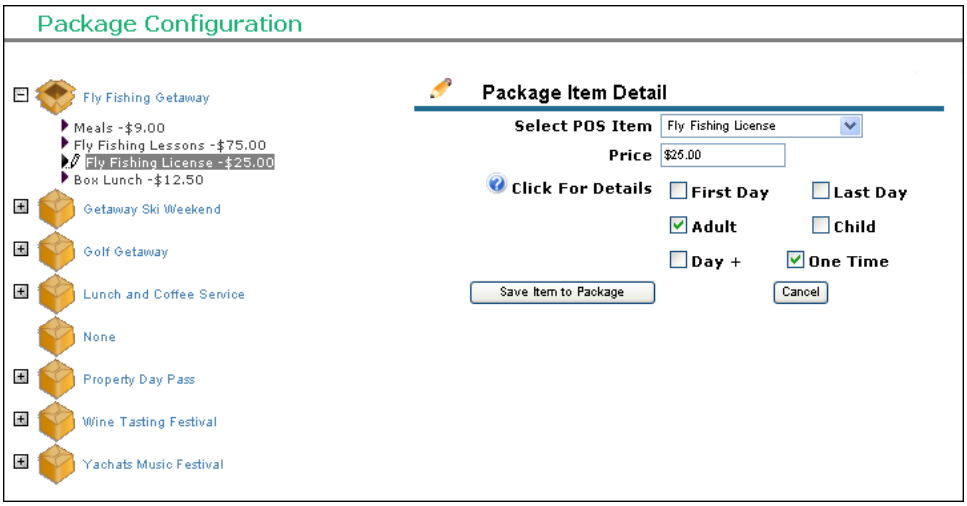
Packages are accessed in the RezStream Booking Engine Online Administrative Interface through the Account > Packages link.



After clicking the Packages link, the Package Configuration form is displayed. Here, a list of all packages uploaded from RezStream Professional is displayed. All packages are listed along with a "+" sign. Clicking the "+" sign displays individual POS items assigned to a package.




Clicking an individual POS item displays details about the item on the Package Item Detail form.

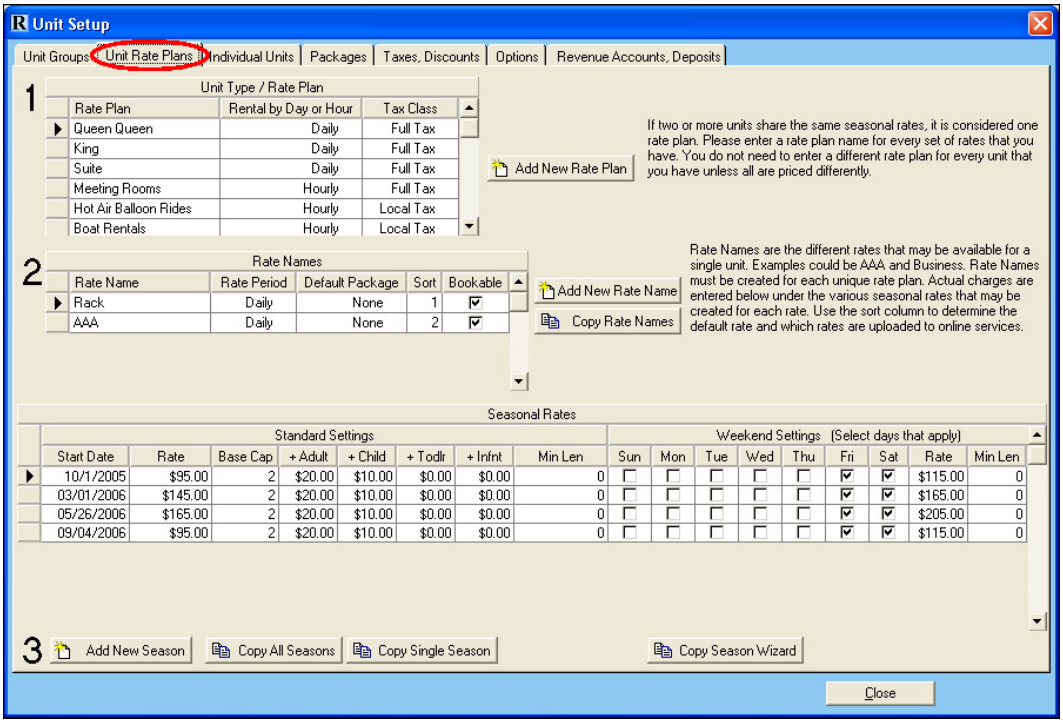



***There is not an action item to complete in this step. Simply confirm that the packages uploaded from RezStream Professional to the RezStream Booking Engine are displayed correctly.***

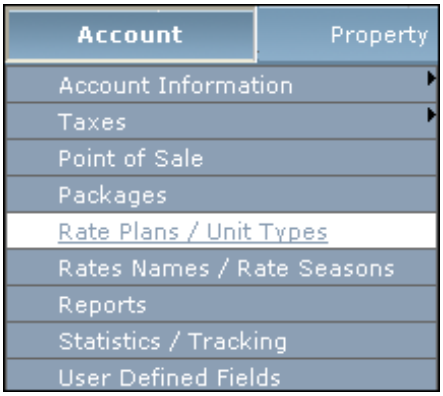
***Any changes to packages MUST be made through RezStream Professional. After making changes to packages in RezStream Professional, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

# RATE PLANS/UNIT TYPES

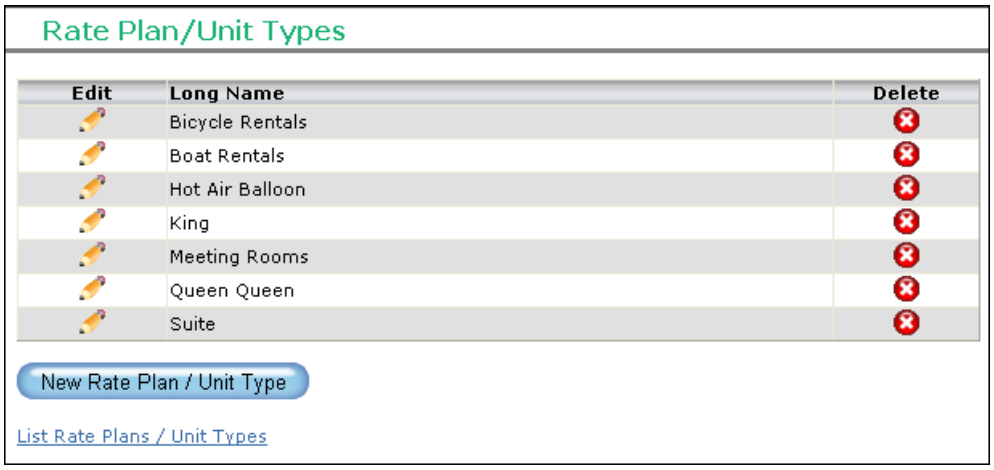
In RezStream Professional, unit types/rate plans are configured by clicking Tools > Unit and Rate Setup and selecting the Unit Rate Plans tab.



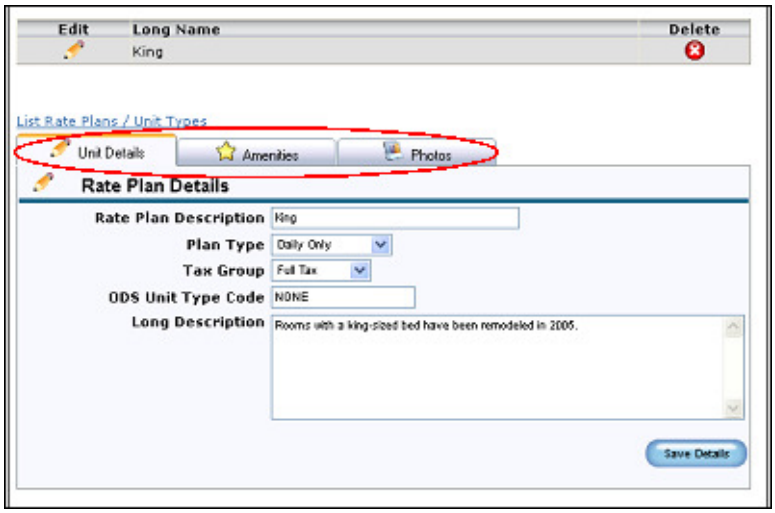

All unit types/rate plans defined in RezStream Professional were previously uploaded to the RezStream Booking Engine via the configuration upload. Once uploaded, unit types/rate plans can be viewed in the RezStream Booking Engine Online Administrative Interface by clicking the Account > Rate Plans/Unit Types link.



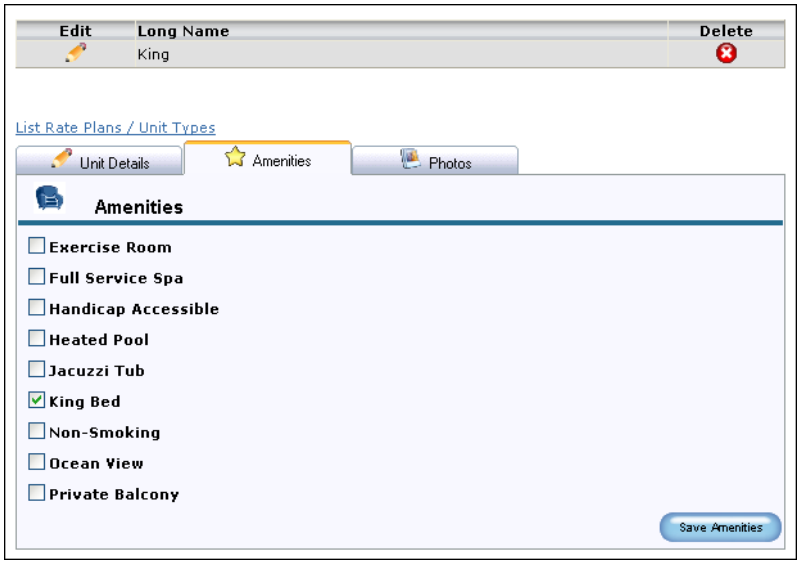
The Rate Plan/Unit Types form is displayed. Here, each rate plan is listed.



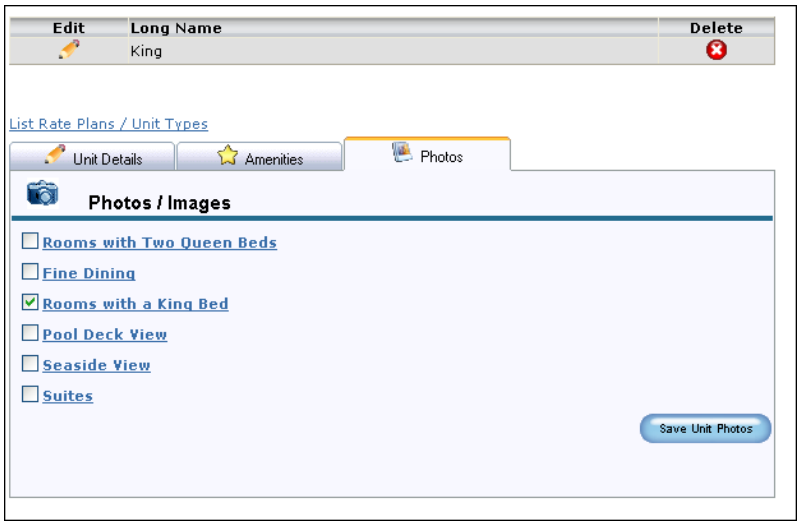

Click the edit icon ( ) associated with a specific rate plan/unit type to view its unit details, amenities, or photos. The information displayed under the Unit Details tab is uploaded from RezStream Professional.



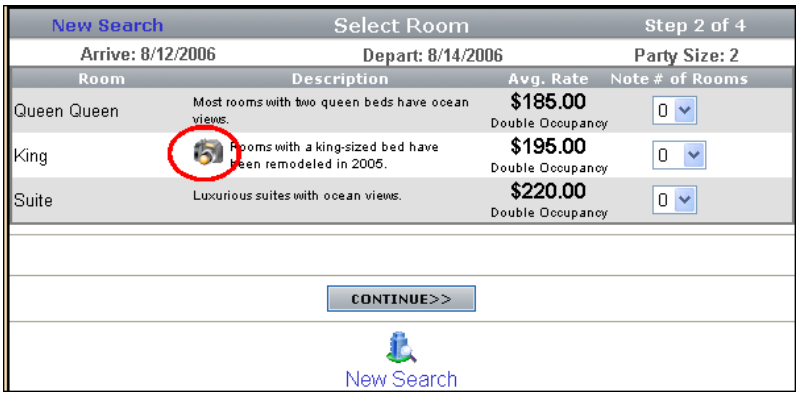
Click the Amenities tab to assign unit type amenities. Enter a checkmark next to the amenities that describe the selected unit.



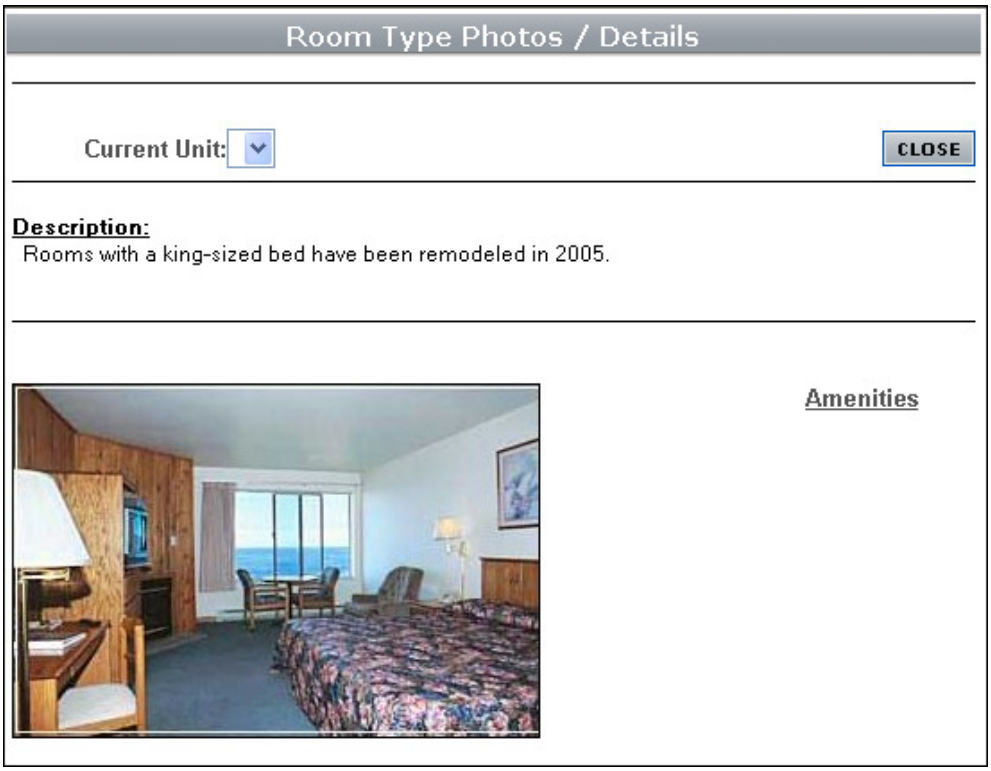

In order for Internet guests to become familiar with a property's unit types (King, Queen Queen, Suite), the Photos tab can be used to assign an image to a unit type. Only those images uploaded using the Account > Account Information > Photos/Images/Media link can be assigned to a unit type. By putting a checkmark in the box next to "Rooms with a King Bed," this photo will be assigned to the selected unit type (King).



With photos assigned to unit types and the RezStream Booking Engine configured to make reservations for unit types (as opposed to individual rooms), a camera icon is displayed on the Select Room page. The Select Room page is displayed to Internet guests after they enter arrival and departure dates.



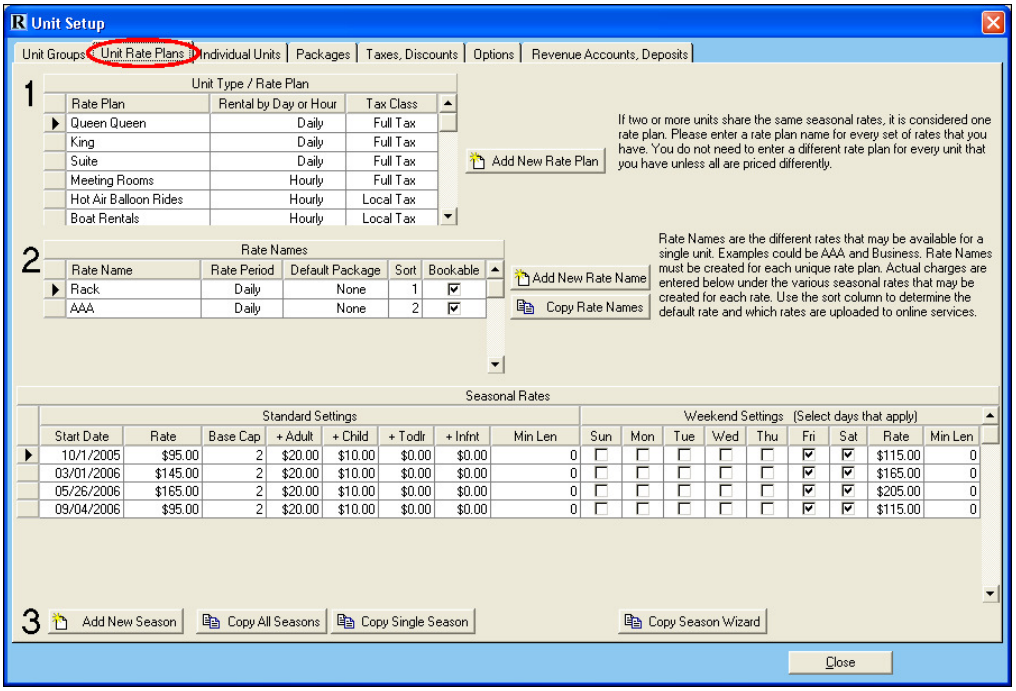

When an Internet guest clicks the camera icon, the King unit type photo is displayed.



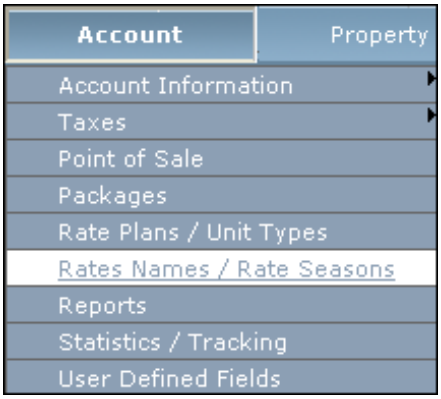

***If your property is planning on guests booking individual units via the RezStream Booking Engine (as opposed to unit types), no action is required in the Photos tab.***

# RATE NAMES/RATE SEASONS

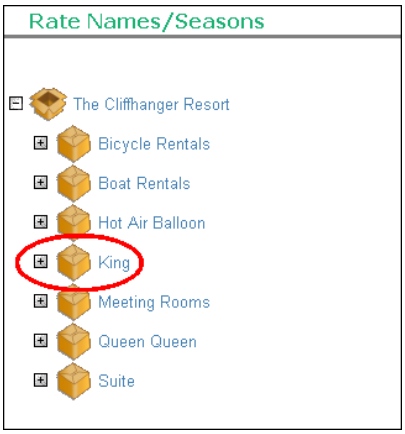
In RezStream Professional, rate names and seasonal rates are configured by clicking Tools > Unit and Rate Setup and selecting the Unit Rate Plans tab.

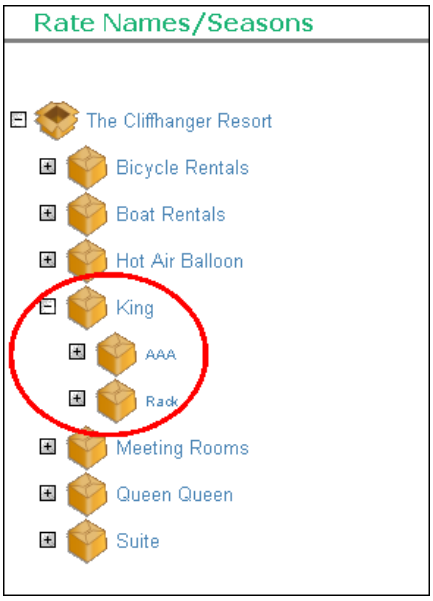



All rate names and seasonal rates defined in RezStream Professional were previously uploaded to the RezStream Booking Engine via the configuration upload. Once uploaded, rate names/rate seasons can be viewed in the RezStream Booking Engine Online Administrative Interface by clicking the Account > Rate Names/Rate Seasons link.

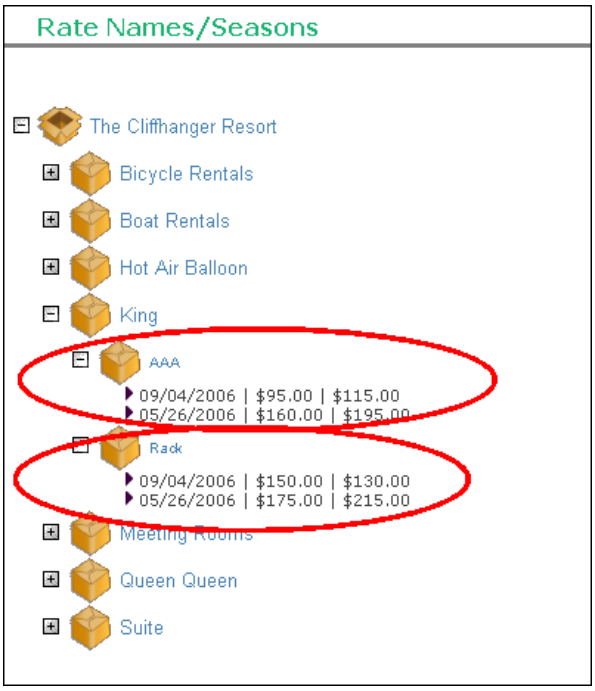


To view rate names, click the "+" associated with a specific unit type/rate plan.

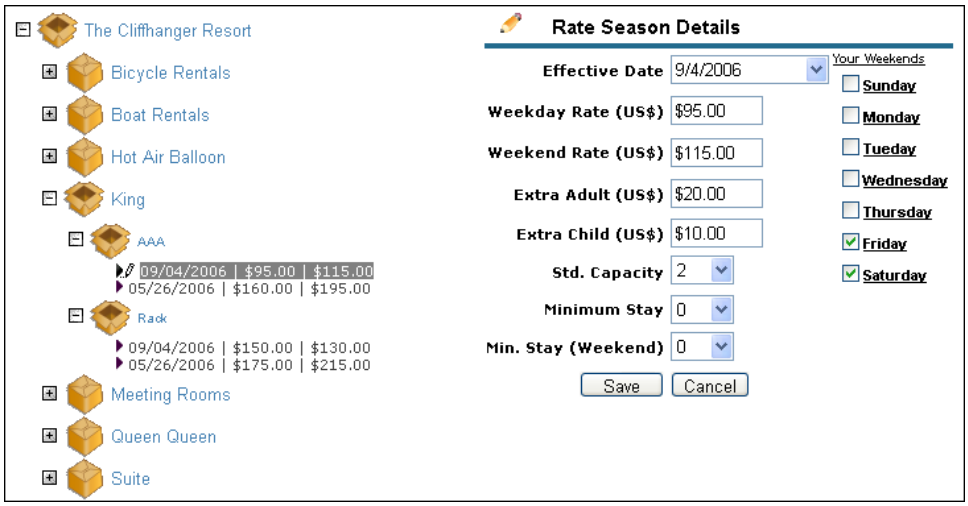



To view rate seasons, click the "+" associated with a rate name.



Clicking a specific rate season lists its corresponding Rate Season Details form.




***There is not an action item to complete in this step. Simply confirm that rate plans, rate names, and seasonal rates uploaded from RezStream Professional to the RezStream Booking Engine are displayed correctly.***

***Rates for dates in the past are NOT uploaded from RezStream Professional to the RezStream Booking Engine.***

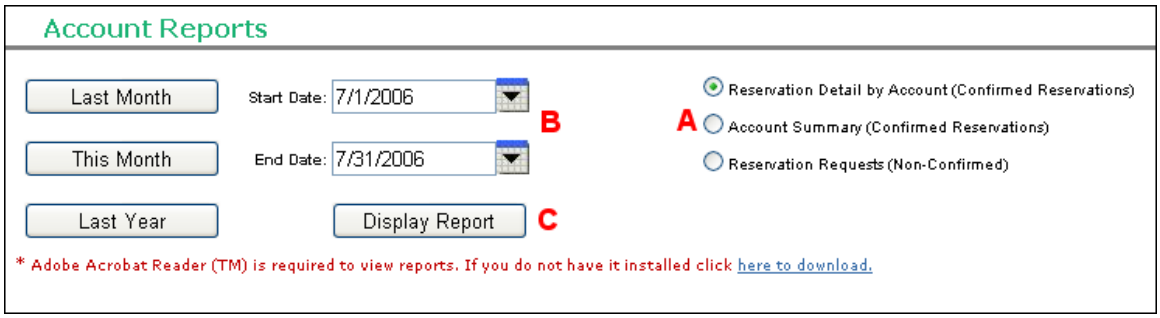
***Any changes to rate plans, rates names, or rate seasons MUST be made through RezStream Professional. After making changes to rate information in RezStream Professional, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

# REPORTS

There are three reservation reports included with the RezStream Booking Engine.

1. Reservation Detail by Account (Confirmed Reservations)
2. Account Summary (Confirmed Reservations)
3. Reservation Requests (Non-Confirmed)

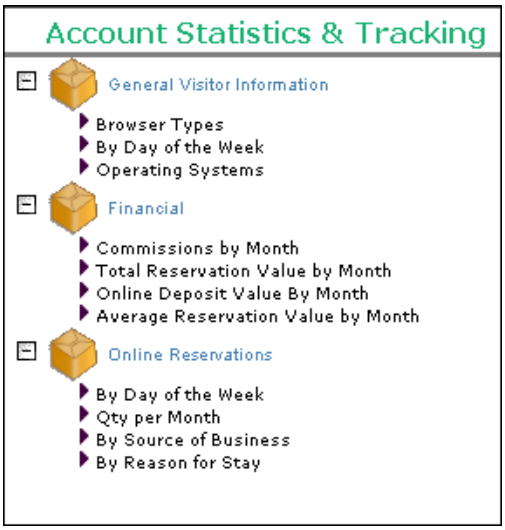
To run a report, use the RezStream Booking Engine Online Administrative Interface Account > Reports link and select the appropriate report radio button (A). Enter start and end report dates from drop-down calendars (B), and click the Display Report button (C).



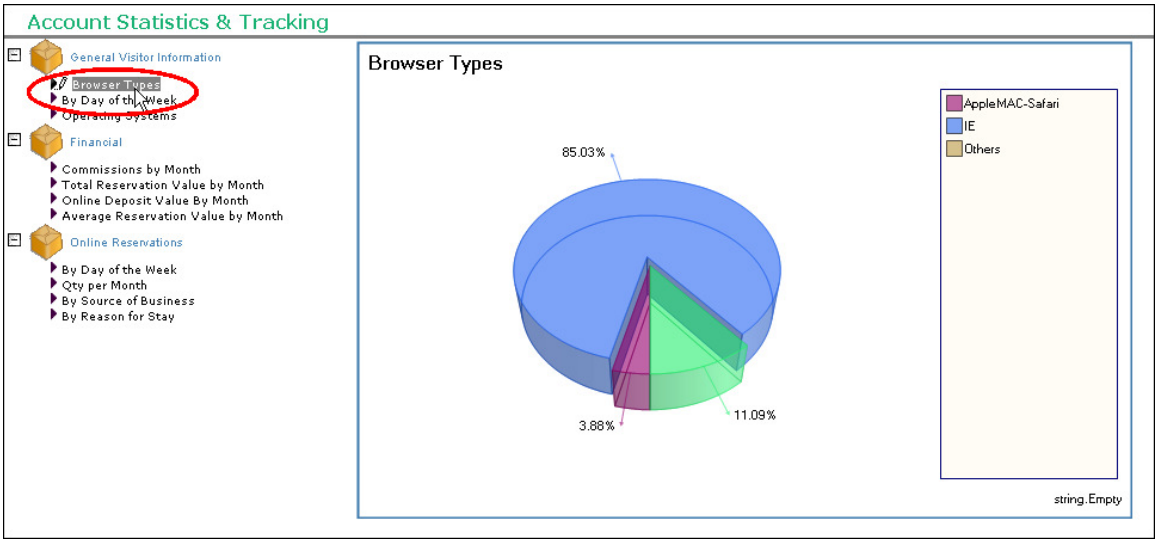

***Adobe Acrobat Reader is required for viewing Account Reports. The Adobe Acrobat Reader can be downloaded free of charge from the Adobe website – www.adobe.com.***

# STATISTICS/TRACKING

Use the RezStream Booking Engine Online Administrative Interface Account > Statistics/Tracking link to run booking engine reports. These reports are broken down into three categories, General Visitor Information, Financial, and Online Reservations.



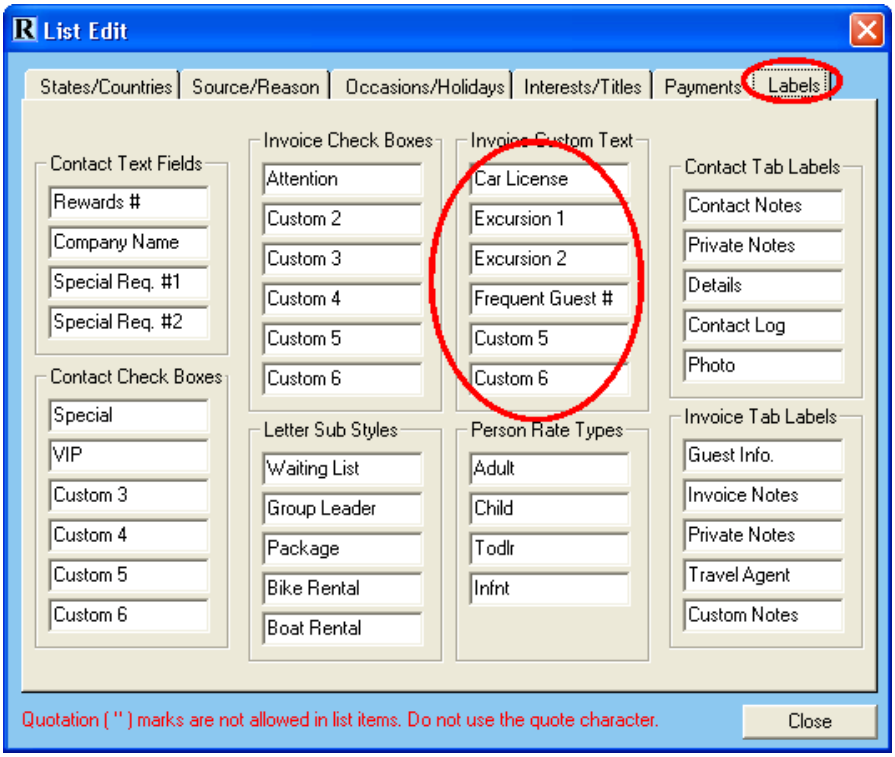
To print a report, simply click the appropriate link. In the example below, the General Visitor Information > Browser Types report has been selected.



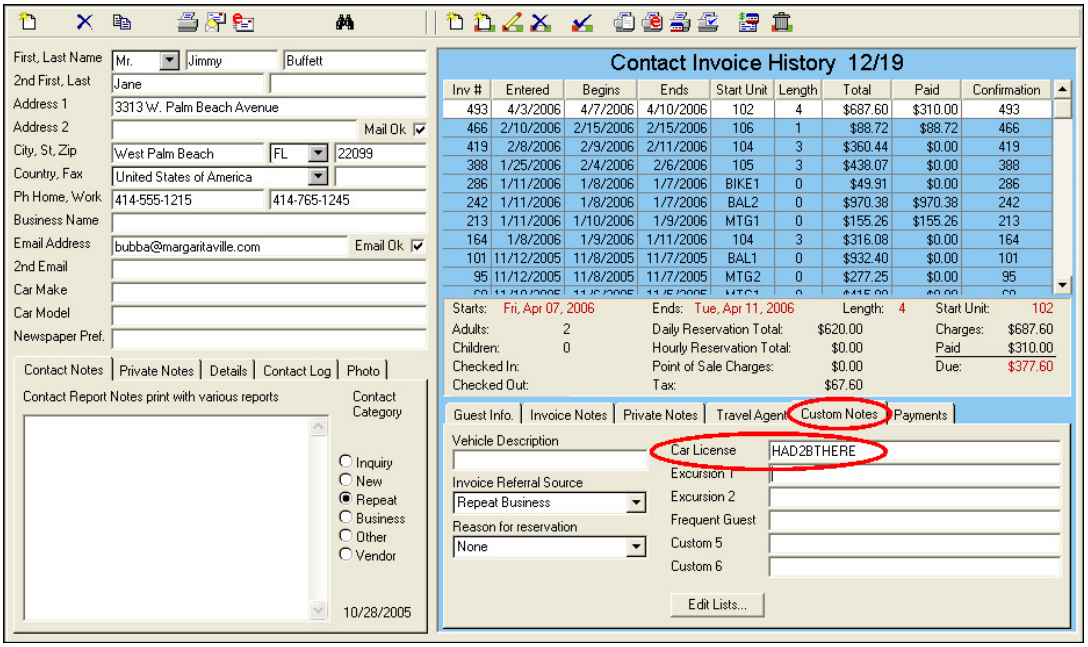

***For additional information on how RezStream can create marketing plans that will generate a guaranteed increase in online revenue, please visit [http://www.rezstream.com/marketing.htm](http://www.rezstream.com/marketing.htm) to view more information on RezStream's new product line: RezStream Website Design, Hosting, and Promotion.***

# USER DEFINED FIELDS

If your property has customized RezStream Professional to track user defined fields in the Contact Data screen, this same information can be collected from online guests while they are making reservations. For example, assume your property has configured RezStream Professional to track Car License numbers. This information is collected during the reservation process and then a "Parking Report" is generated for in-house guests. The customization of the user defined field is made in RezStream Professional by clicking Tools > List Edit > Labels.

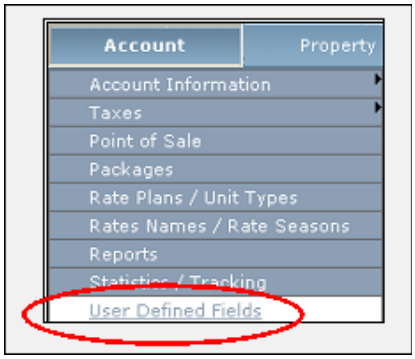



In our example, if we wanted to keep track of a guest's license plate number in the Contact Data screen, one option is for the reservationist to enter the car license number under the Custom Notes field.

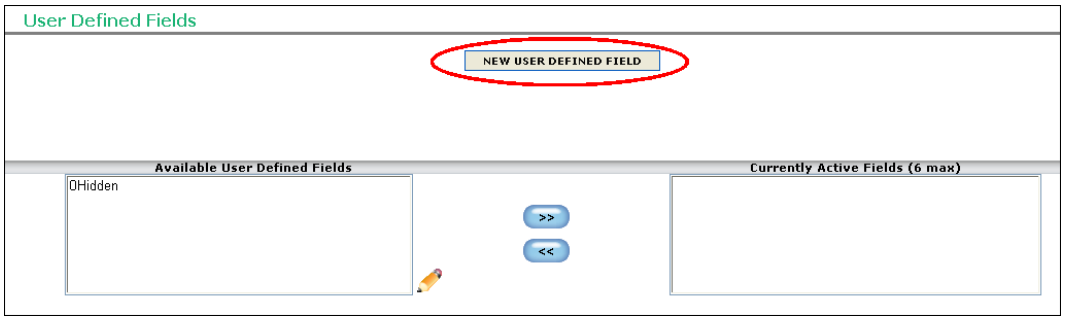



Another option would be to prompt the online guest for the same information. Use the following steps to create the user defined field in the RezStream Booking Engine.

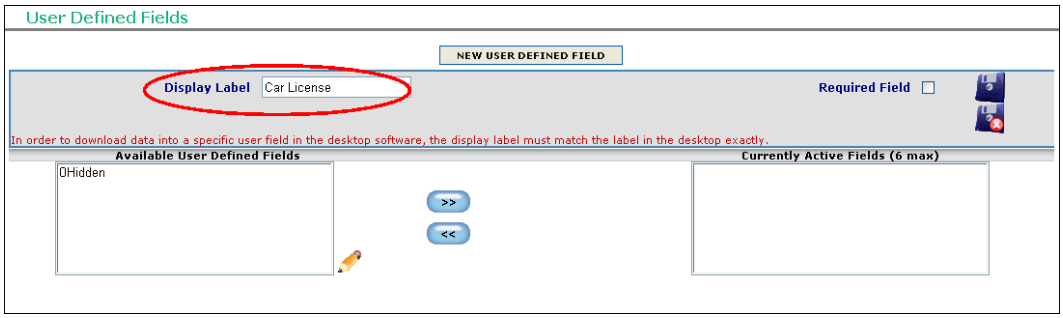
1. From the RezStream Booking Engine Online Administrative Interface, click Account > User Defined Fields.



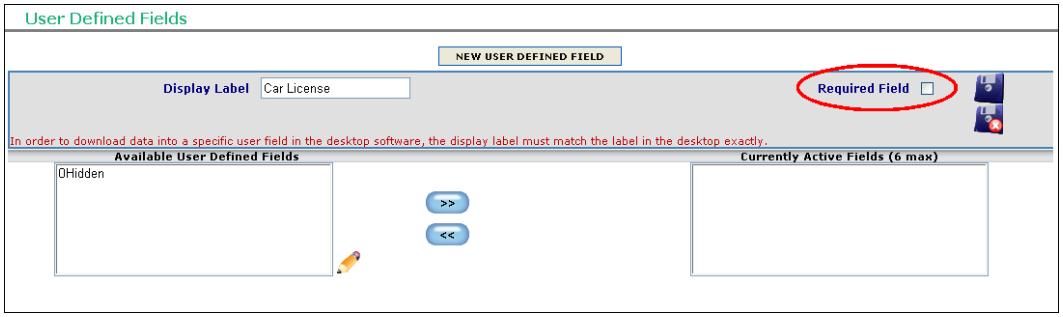

2. Click the New User Defined Field button.



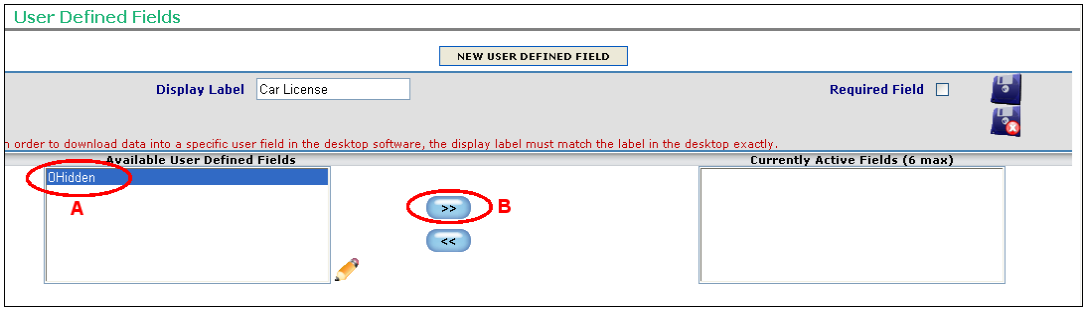

3. Enter a display label description. Note that this label **must exactly match** the text entered in RezStream Professional's Tools > List Edit > Labels field.


User Defined Fields
NEW USER DEFINED FIELD
Display Label
Car License
Required Field
In order to download data into a specific user field in the desktop software, the display label must match the label in the desktop exactly.
Available User Defined Fields
Currently Active Fields (6 max)
0Hidden
>>
<<

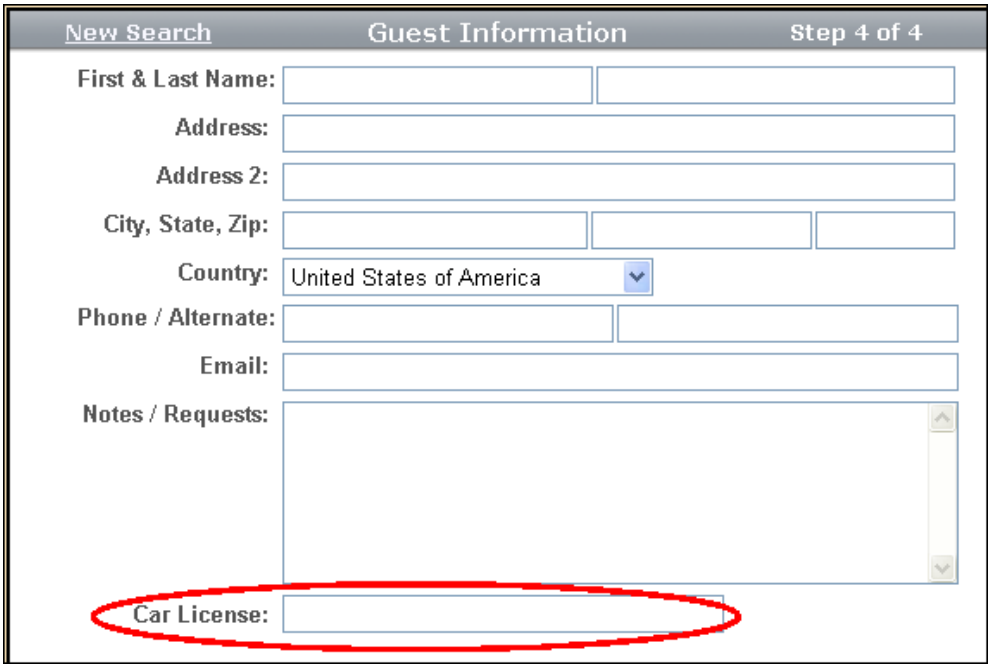
4. If this user defined field will be required for the online guest to complete when making a reservation, enter a checkmark in the box next to Required Field.


User Defined Fields
NEW USER DEFINED FIELD
Display Label
Car License
Required Field
In order to download data into a specific user field in the desktop software, the display label must match the label in the desktop exactly.
Available User Defined Fields
Currently Active Fields (6 max)
0Hidden
>>
<<

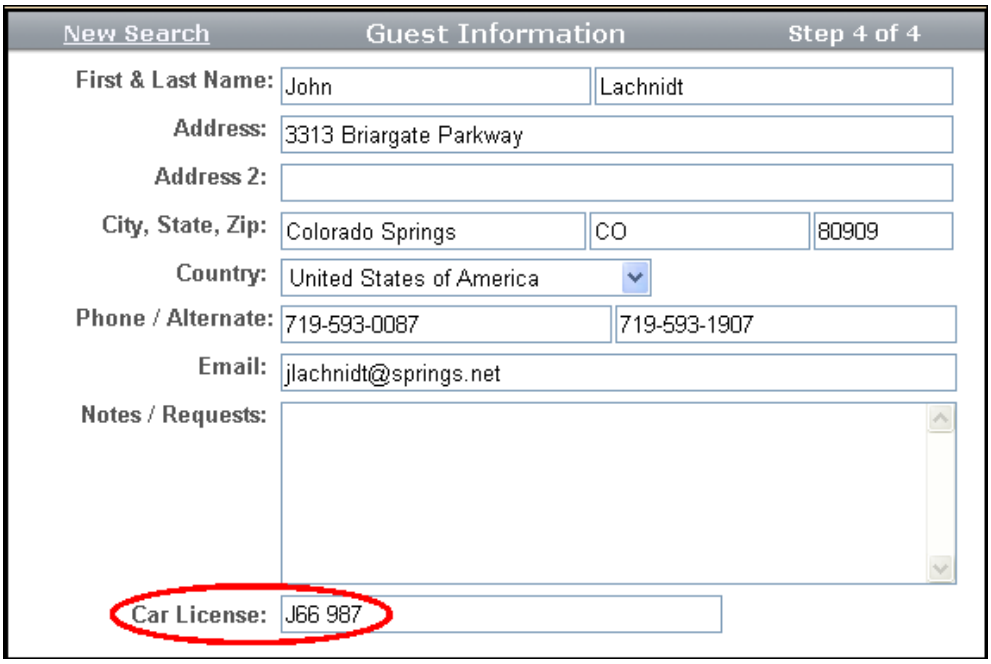
5. To make the new user defined field active, highlight the "0Hidden" text (A) in the Available User Defined Fields box and click the right arrow button (B).




During the online reservation process, the user defined field, Car License, now displays on the Guest Information page.



The guest enters their license number along with other personal information.

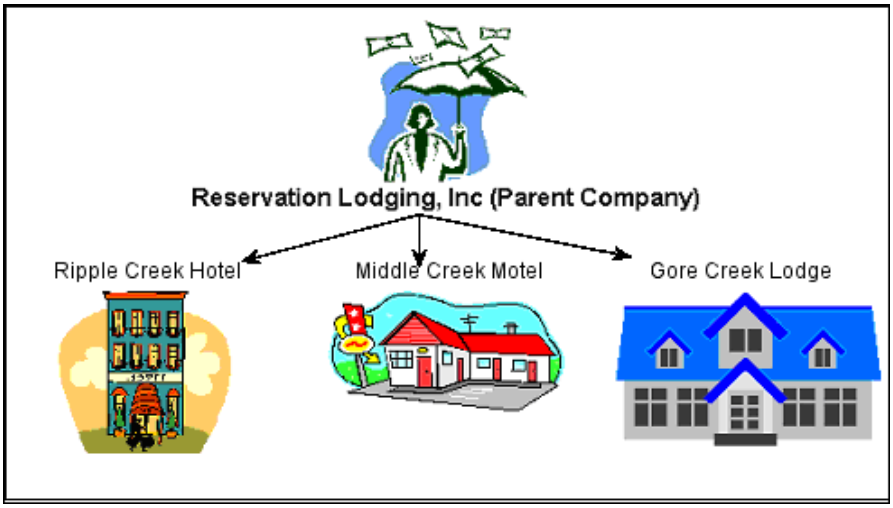



***The information entered in the user defined field (Car License) is then transferred to RezStream Professional along with the online reservation.***

***Upon completing the Account setup menu, you are now ready to proceed to Property setup.***

# 6. COMPLETE PROPERTY SETUP

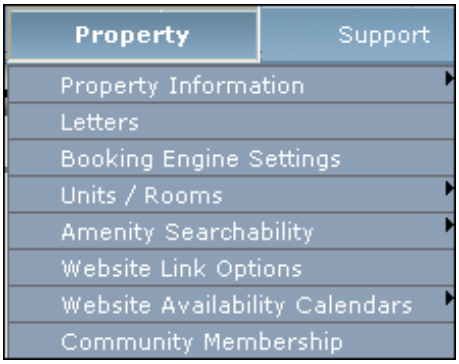
The Property setup menu can be used for configuring the RezStream Booking Engine for unique properties. For example, a group of three related properties owned by the same company would be configured under one account. However, specific information about each property would be defined in the Property setup menu. A graphical representation of this relationship follows.




In the example above, there is one parent company, Reservation Lodging, Inc. This umbrella company would be configured under one Account setup. Next, the RezStream Booking Engine would be customized to operate based on which property the Internet guest selects when booking a reservation. For example, guest letters are configured under the Property setup menu. While many of the policies for Reservation Lodging may apply to all three properties (cancellation policies and deposit rules), the letters that guests receive will be unique, even if the changes are subtle, such as property addresses, directions, and specific amenities.

***For single properties, the Account and Property setup menus have a one-to-one correlation.***

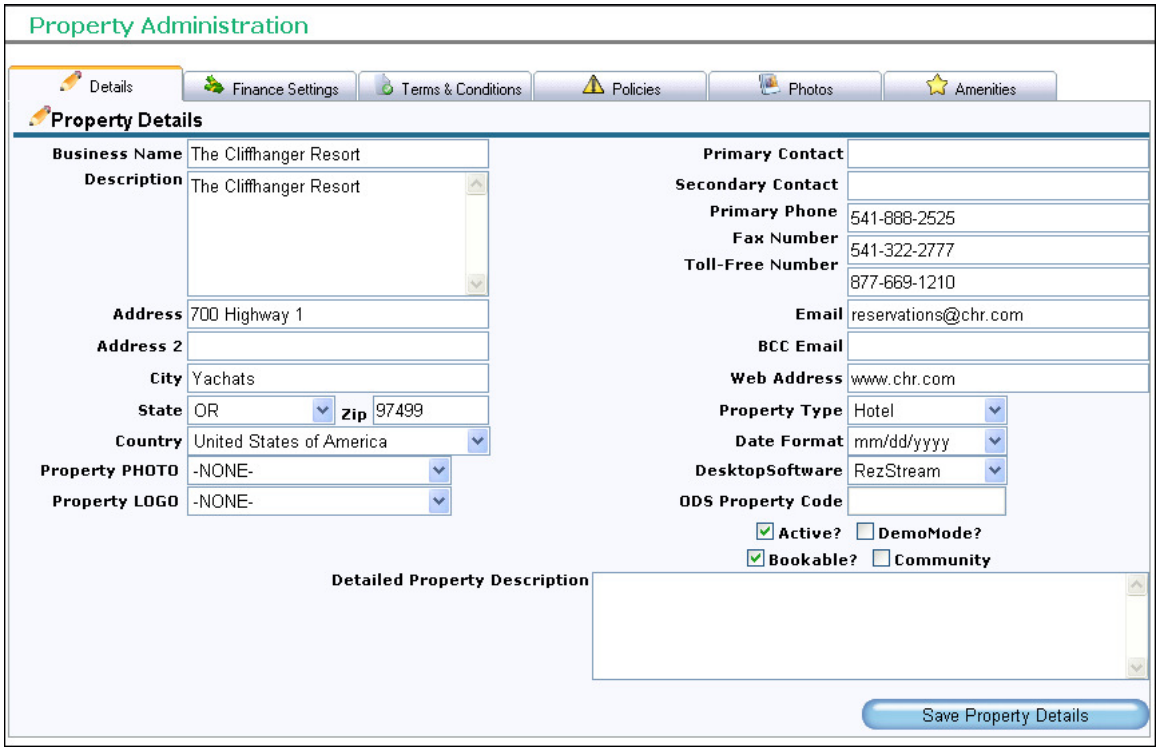
This section will take you through the Property setup menu for our sample property. The Property menu is organized in the order in which forms should be completed, beginning with Property Information and ending with Website Availability Calendars.




***As of February 2007, the Community Membership feature is not fully implemented and there is no action item to complete under this link.***

# PROPERTY INFORMATION

The RezStream Booking Engine Online Administrative Interface Property > Property Information link is organized into six tabs, Details, Finance Settings, Terms & Conditions, Policies, Photos, and Amenities.




For companies with multiple properties, this property-specific information form will be completed for each unique property.

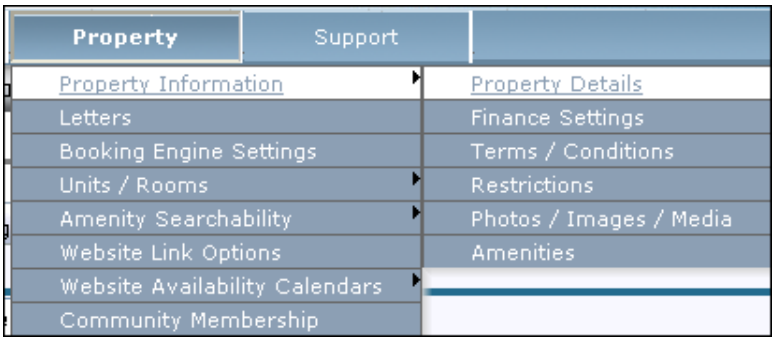
## PROPERTY DETAILS

The Details tab is used to define specific property information, including:

- Business Name
- Description
- Address and Phone Numbers
- Property Photo
- Property Logo
- Contact Information
- Email and Web Address
- Property Type (Bed and Breakfast, Hotel, Motel, Lodge, Cabins, etc.)
- Desktop Software
- ODS Property Code
- Detailed Property Description

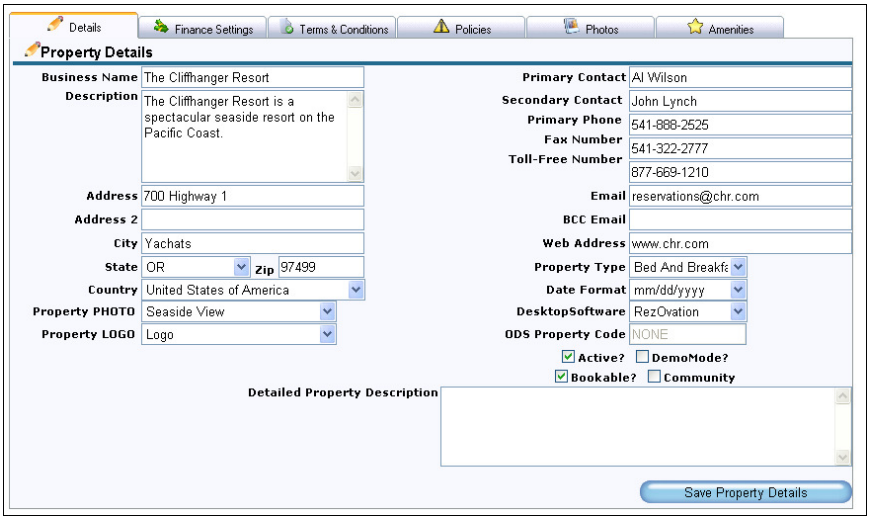
Use the following steps to complete the Property Details form.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Property Information > Property Details link. Alternatively, click the Property > Property Information link and select the Details tab.




2. Complete the Property Details form. A completed form is displayed below. All fields on the Property Details form were previously defined in the Account > Account Information > Details form and automatically transferred to the Property > Property Details form, except:

   a. Description
   b. Property Photo
   c. Property Logo
   d. Primary Contact
   e. Secondary Contact
   f. BCC Email
   g. Property Type
   h. Date Format
   i. Desktop Software
   j. ODS Property Code
   k. Detailed Property Description




3. After completing these fields, click the Save Property Details button.

***Pay attention to drop-down versus data entry fields. Drop-down fields are identified with a down arrow.***

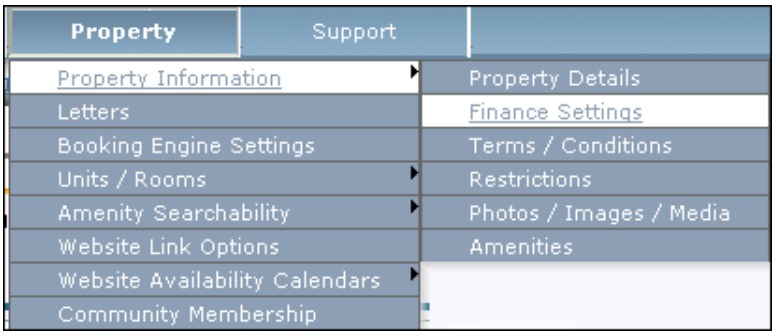
# FINANCE SETTINGS

The Property > Property Information > Finance Settings link is used to specify billing contact information and the credit card used for deducting RezStream commissions for online reservations.

## *Add/Edit Finance Settings*

Use the following steps for completing the Billing Information form.

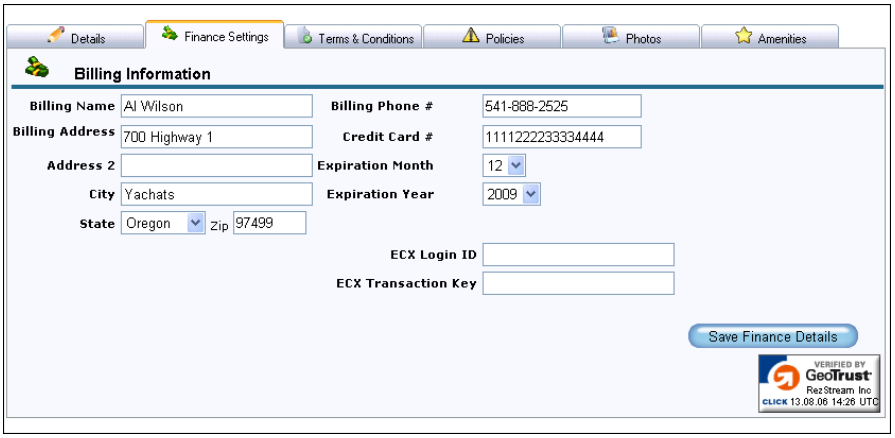
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Property Information > Finance Settings link. Alternatively, click the Property > Property Information link and select the Finance Settings tab.




2. The Billing Information form is displayed. Complete the following fields:

   a. Billing Name
   b. Billing Address
   c. Address 2
   d. City
   e. State
   f. Zip
   g. Billing Phone #
   h. Credit Card #
   i. Expiration Month
   j. Expiration Year
   k. ECX Login ID
   l. ECX Transaction Key

3. Click the Save Finance Details button.

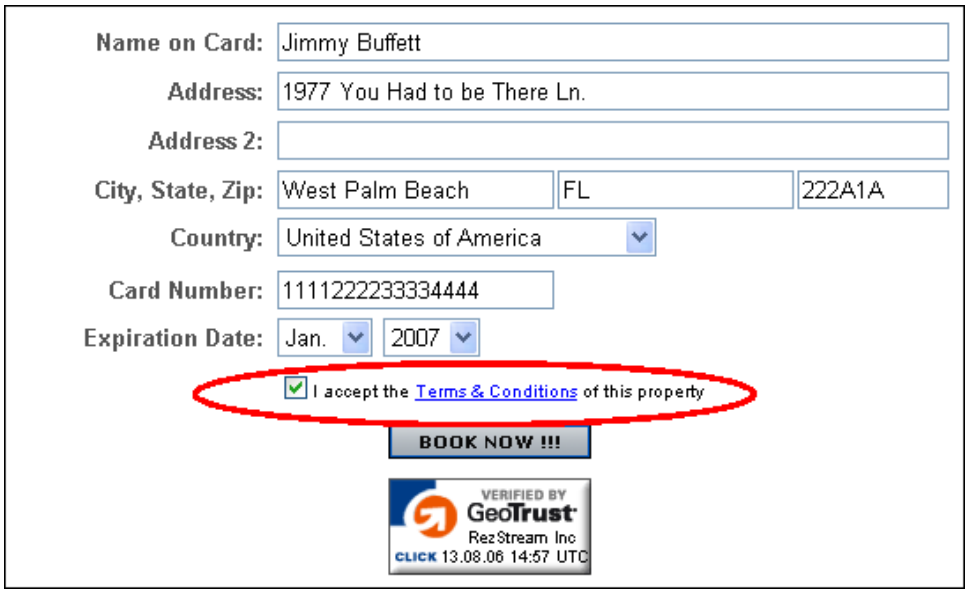


The following table describes the fields in the Billing Information form.

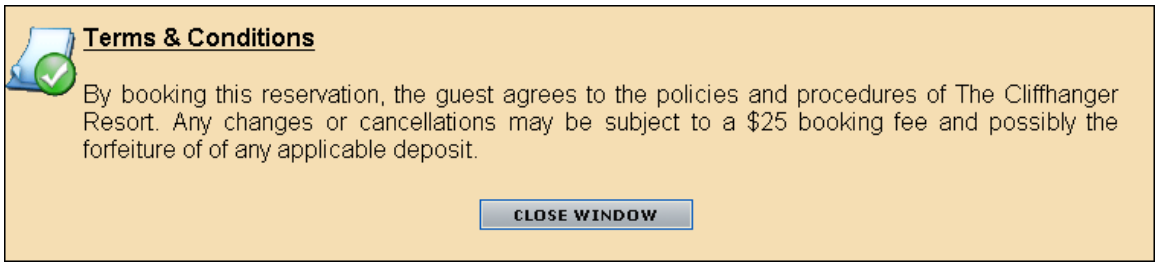
| FIELD | DESCRIPTION |
|---|---|
| Billing Name | Enter the property's billing contact. |
| Billing Address | Enter the billing contact's street address. |
| Address 2 | PO Box or additional address information. |
| City | Billing city |
| State | Billing state |
| Zip | Billing zip |
| Billing Phone Number | Billing phone number |
| Credit Card Number | Enter the credit card number that will be used to pay commissions for RezStream Booking Engine reservations. |
| Expiration Month | Credit card expiration month |
| Expiration Year | Credit card expiration year |
| ECX Login ID | Enter the FNP merchant account login ID required to process transactions against the property's merchant account. |
| ECX Transaction Key | Enter the transaction key required to process transactions against the property's merchant account. |

## TERMS/CONDITIONS

A detailed terms & conditions statement can be displayed during the online booking process. After an Internet guest enters his personal and billing information, a hyperlink to the property's terms & conditions is displayed.

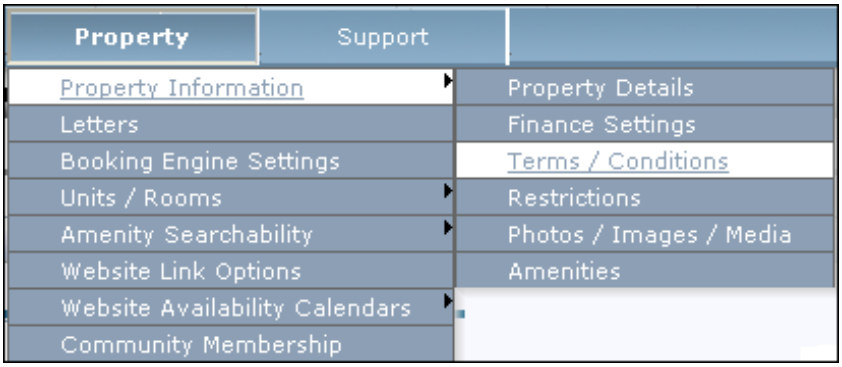


If the Internet guest clicks the hyperlink, the property's terms & conditions are displayed.

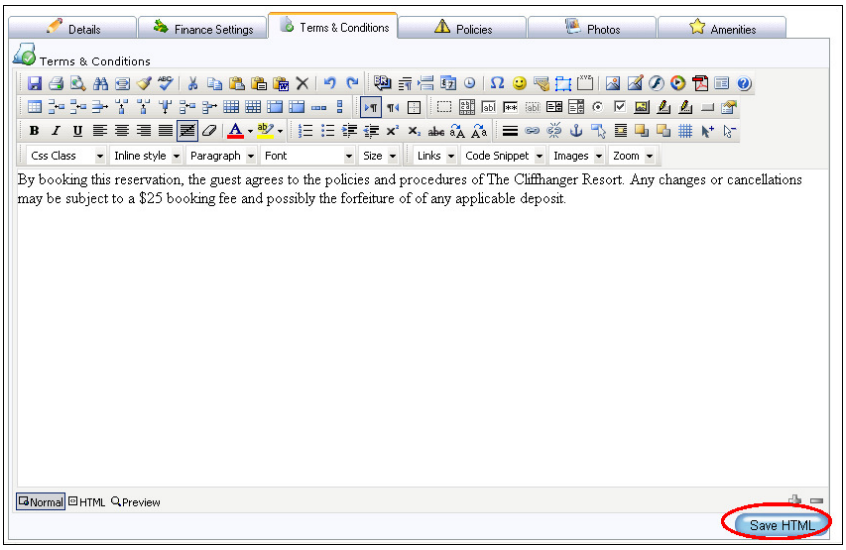

Terms & Conditions
By booking this reservation, the guest agrees to the policies and procedures of The Cliffhanger Resort. Any changes or cancellations may be subject to a $25 booking fee and possibly the forfeiture of of any applicable deposit.
CLOSE WINDOW

These terms & conditions are entered using the following steps.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Property Information > Terms/Conditions link. Alternatively, click the Property > Property Information link and select the Terms & Conditions tab.




2. Enter a detailed text message describing your property's terms & conditions and click the Save HTML button.


Details
Finance Settings
Terms & Conditions
Policies
Photos
Amenities
Terms & Conditions
By booking this reservation, the guest agrees to the policies and procedures of The Cliffhanger Resort. Any changes or cancellations may be subject to a $25 booking fee and possibly the forfeiture of of any applicable deposit.
Normal
HTML
Preview
Save HTML

***Use the buttons in the HTML editor to apply special formatting (bold, underline, italics, font color, font type, etc.) to customize the look of your property's terms & conditions statement.***

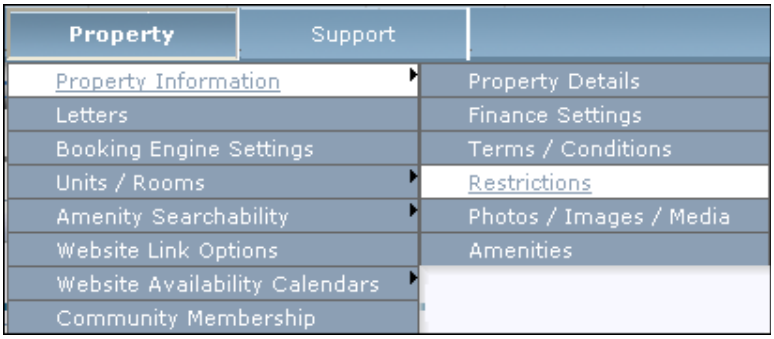
# RESTRICTIONS

Property restrictions are displayed to guests making reservations online under the Policies section of the Reservation Details form.

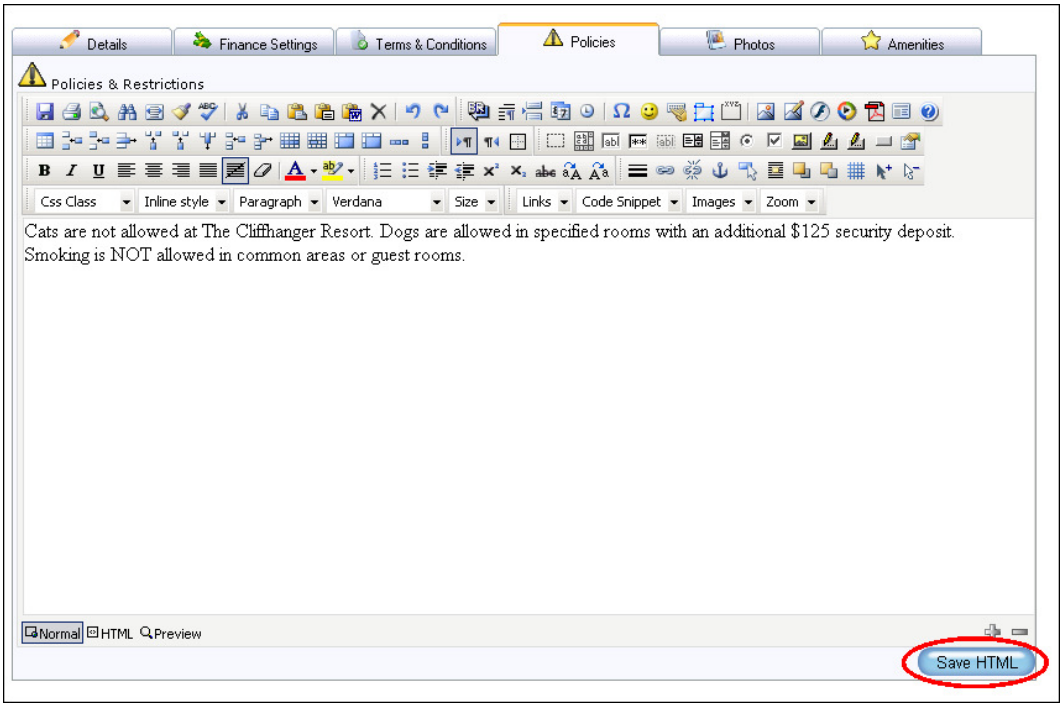
Purpose of your Visit?
Friends & Family
How Did you Find Us?
Referal: Previous Guest
Policies:
Cats are not allowed at The Cliffhanger Resort. Dogs are allowed in specified rooms with an additional $125 security deposit. Smoking is NOT allowed in common areas or guest rooms.
CONTINUE >>
New Search
Powered by rezStream

Restrictions are added using the following steps.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Property Information > Restrictions link. Alternatively, click the Property > Property Information link and select the Policies tab.



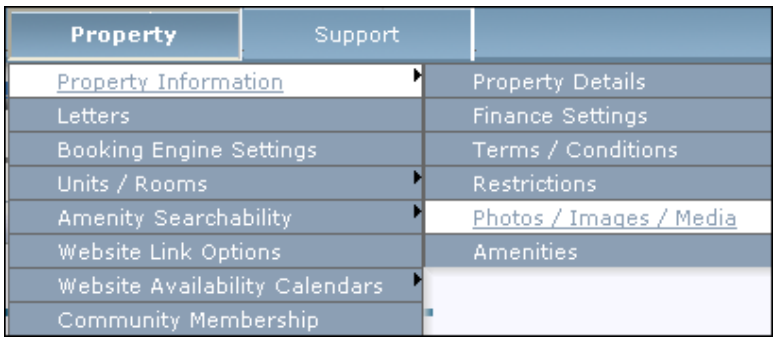
2. Enter a detailed text message describing your property's restrictions and click the Save HTML button.




***Use the buttons in the HTML editor to apply special formatting (bold, underline, italics, font color, font type, etc.) to customize the look of your property's Restrictions statement.***

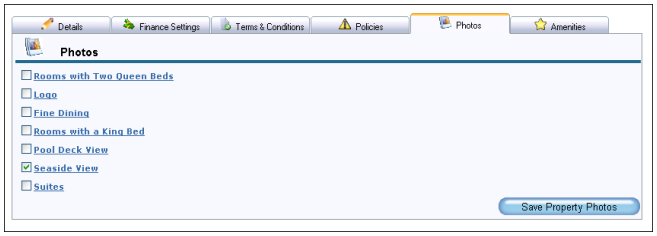
## PHOTOS/IMAGES/MEDIA

For companies that accept Internet bookings for multiple properties through the RezStream Booking Engine, a property photo can be assigned using the Property > Property Information > Photos/Images/Media link. Alternatively, click the Property > Property Information link and select the Photos tab.




The photo assigned in this step can help Internet guests become acquainted with the property prior to making the reservation.

After clicking the Photos/Images/Media link, enter a checkmark next to the previously uploaded image that represents the current property.




Remember to click the Save Property Photos button when finished.

# AMENITIES

For companies that are configuring multiple properties for use with the RezStream Booking Engine, amenities can be used to describe property features and differentiate properties. All amenities, regardless of property, are defined using the RezStream Booking Engine Online Administrative Interface Account > Account Information > Amenities link. The Property > Property Information > Amenities link is then used to assign specific amenities to their respective property.

By entering a checkmark next to an amenity in the Property > Property Information > Amenities link, property-wide amenities are marked as searchable. With searchable property-wide amenities, Internet guests are able to find a property with specific amenities (i.e. – a Heated Pool).

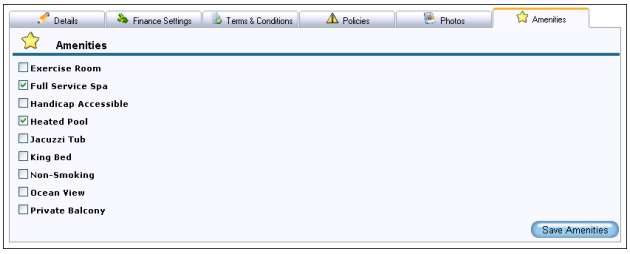
***For companies configuring a single property for use with the RezStream Booking Engine, there is no action required in the Property > Property Information > Amenities link.***

## *Assign a Property Level Amenity*

Use the following steps for assigning property level amenities in the RezStream Booking Engine.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Property Information > Amenities link. Alternatively, click the Property > Property Information link and select the Amenities tab.

2. All amenities previously defined in the RezStream Booking Engine Account setup are displayed. To assign an amenity to the active property (the one you are currently configuring), enter a checkmark next to its description. By entering a checkmark, the amenity is automatically flagged as "searchable."




***See the Property > Amenity Searchability section for information about making amenities non-searchable.***

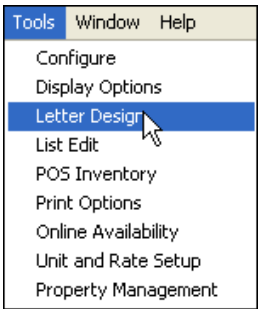
***If a company listed several properties through the RezStream Booking Engine with different property level amenities, it would help to flag certain amenities as searchable.***

# LETTERS

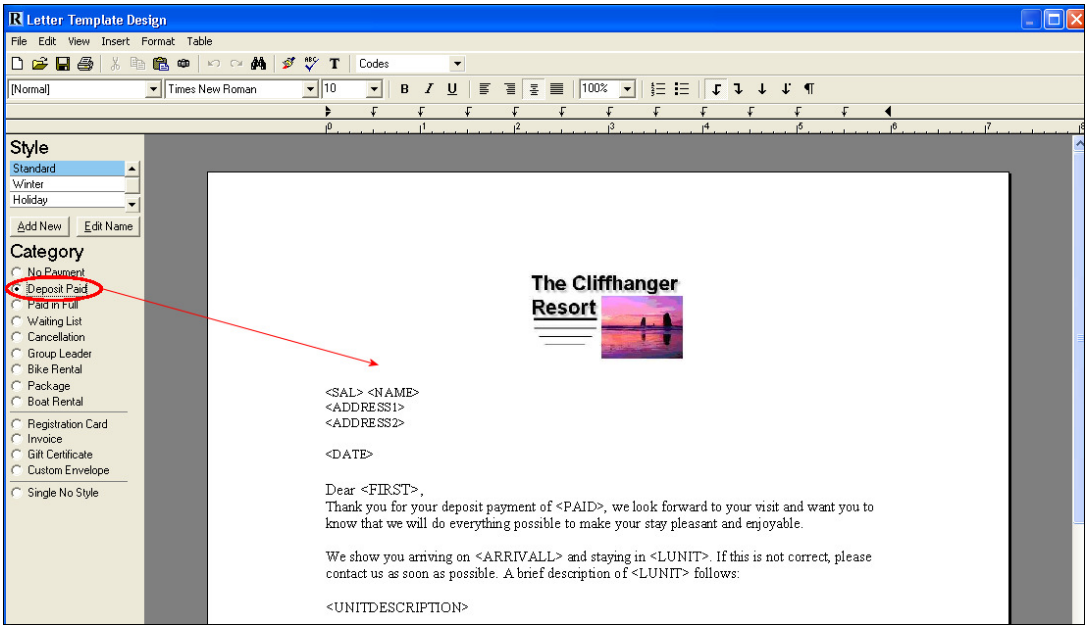
Two guest confirmation letters are automatically uploaded from RezStream Professional to the RezStream Booking Engine.

1. No Payment
2. Deposit Paid

Letters are created in RezStream Professional by clicking Tools > Letter Design.

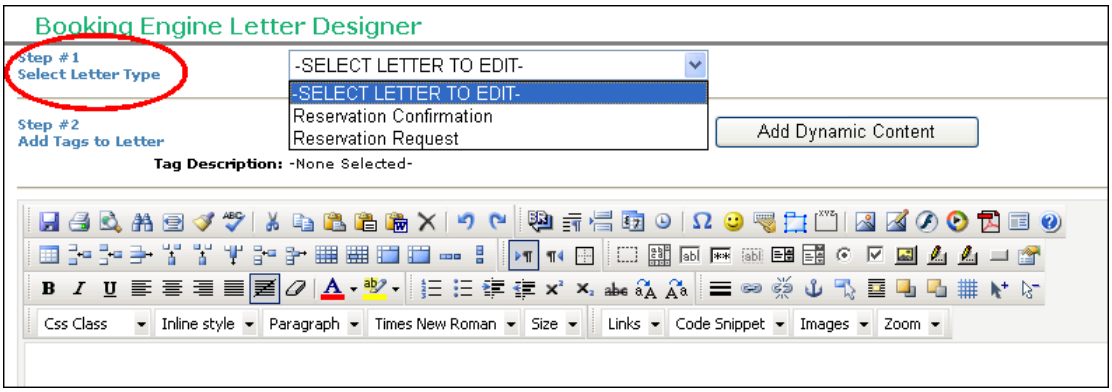



A list of RezStream Professional letters is located on the left-hand menu. Selecting a radio button in the left-hand menu displays the corresponding letter's text in the right-hand frame.

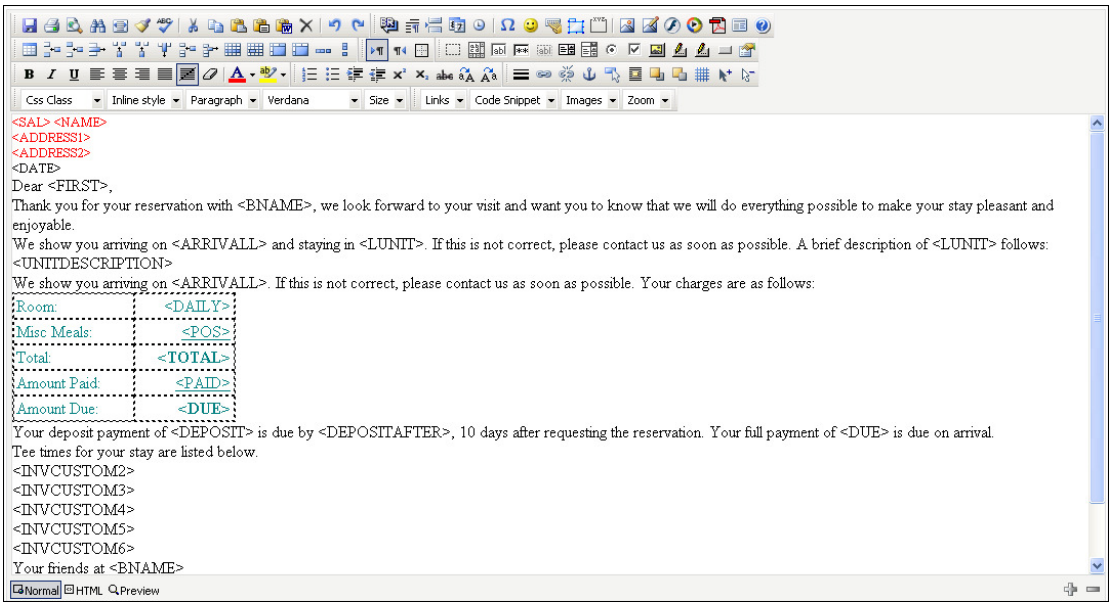



After uploading data from RezStream Professional to the RezStream Booking Engine, letters can be viewed and edited by clicking the Property > Letters link in the RezStream Booking Engine Online Administrative Interface and selecting a letter.

***The RezStream Professional "No Payment" letter is uploaded to the RezStream Booking Engine and named "Reservation Request." The RezStream Professional "Deposit Paid" letter is uploaded to the RezStream Booking Engine and named "Reservation Confirmation."***




Letters uploaded from RezStream Professional to the RezStream Booking Engine can be customized for online use by selecting the letter from the drop-down list in "Step #1/Select Letter Type" and making the changes in letter editor text box.




To make changes, simply type text as you would in any word processing program. Letter codes can be inserted into the letter at the cursor insertion point by choosing the desired code from the drop-down list in Step #2/Add Tags to Letter.

***Letters are ONLY uploaded when the RezStream Booking Engine is initially configured. They are NOT uploaded as part of the Verify Configuration Data utility. Changes to letters that should be reflected in both RezStream Professional and the RezStream Booking Engine must be made twice, once in the RezStream Professional software and again in the RezStream Booking Engine Online Administrative Interface.***

# BOOKING ENGINE SETTINGS

The Booking Engine Settings link on the Property menu is the gateway for defining how the RezStream Booking Engine reacts when an Internet guest makes an online booking. The categories for configuring the RezStream Booking Engine are listed below.

- Guest Payment Settings
- Design Header
- Design Footer
- Reservation Defaults
- Guest Tracking
- Style Reservation Pages
- Reservation Behavior
- Property Management/Owner Options

***When configuring the RezStream Booking Engine for the first time, it is important to work through the specific default settings in each main category of Booking Engine Settings, completing each one so that the RezStream Booking Engine is configured to meet your property's needs.***

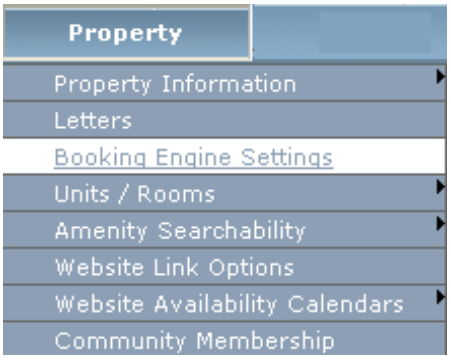
## GUEST PAYMENT SETTINGS

Use Guest Payment Settings to define:

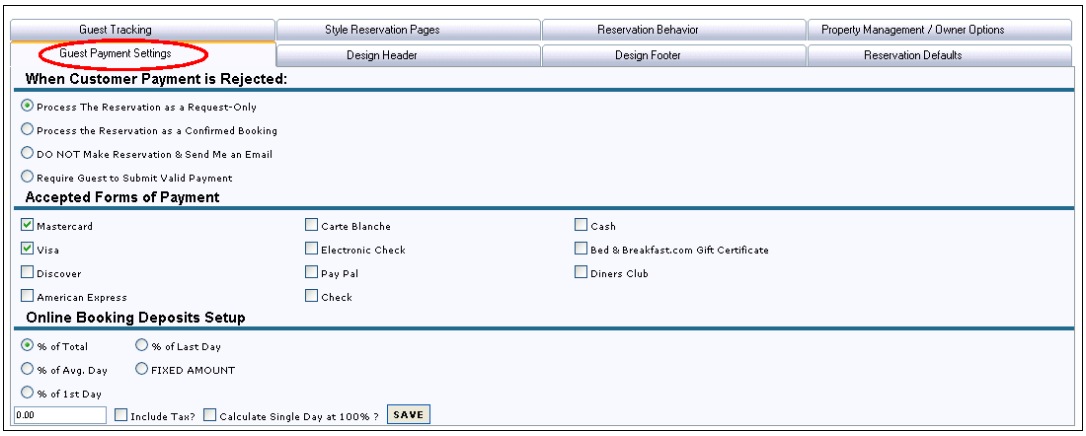
1. How the RezStream Booking Engine reacts when a customer payment is rejected.
2. Forms of payment accepted at the property.
3. Online deposit requirements.

Use the following steps to access the Guest Payment Settings.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.



2. Click the Guest Payment Settings tab and complete the fields under each section title.



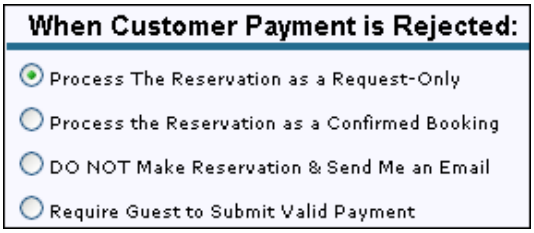

## *When Customer Payment is Rejected*

Use the following steps to access the "When Customer Payment is Rejected" settings.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Guest Payment Settings tab.

When an Internet guest makes an online reservation, the RezStream Booking Engine can be configured to require a payment. If the Internet guest's credit card is rejected, the RezStream Booking Engine can react in one of four ways.


When Customer Payment is Rejected:
Process The Reservation as a Request-Only
Process the Reservation as a Confirmed Booking
DO NOT Make Reservation & Send Me an Email
Require Guest to Submit Valid Payment

Each option is described below.

1. The reservation is displayed on the Daily screen in RezStream Professional as a "Reservation No Payment" reservation. The Internet guest receives a Reservation Request email confirmation.

2. The reservation is processed as a confirmed booking but marked as a reservation with a balance due. It is the property's responsibility to contact the guest and process a valid deposit. In this scenario, availability is updated for the requested dates and a room IS deducted from inventory. The guest receives a Reservation Confirmation email.

3. The reservation is NOT processed. However, the property's primary contact is notified via email that the Internet guest attempted a booking.

4. The reservation is NOT processed. The Internet guest is prompted to submit a valid form of payment.

After selecting the appropriate radio button for how the RezStream Booking Engine should react, click the Save button.

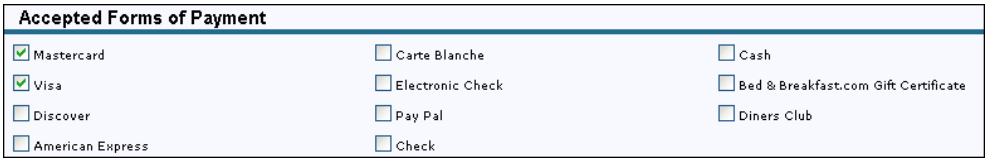
## *Accepted Forms of Payment*

Use the following steps for defining the forms of online payment accepted at the property.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Guest Payment Settings tab.

3. Under the "Accepted Forms of Payment" heading, enter the types of online payments accepted at your property.




4. Click the Save button.

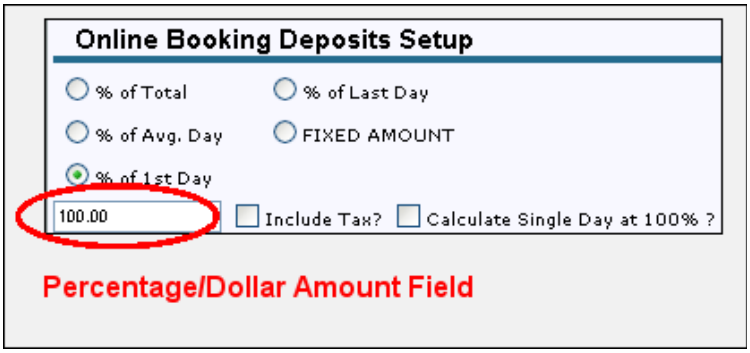
## *Online Booking Deposits Setup*

The Internet guest can be required to submit a deposit while booking a reservation. There are several online deposit options available. These options are stored in the "Online Booking Deposits Setup" section. Use the following steps for accessing the form and configuring the RezStream Booking Engine for online deposits.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Guest Payment Settings tab.

3. Under the Online Booking Deposits Setup heading, select the desired online deposit radio button and enter the appropriate percentage or dollar amount in the field circled below.



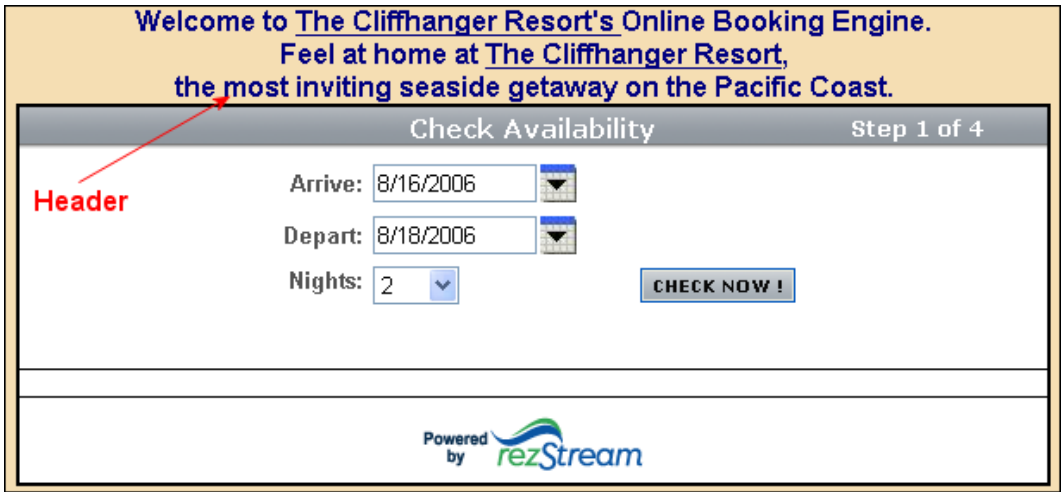

4. Click the Save button.

Options for online deposits are described in the following table.

| DEPOSIT OPTION | DESCRIPTION |
|---|---|
| % of Total | The online deposit percentage is calculated based on the reservation total. Enter the deposit percentage in the percentage/dollar amount field in the bottom left-hand corner of the form. |
| % of Avg. Day | Because the nightly room charge could vary based on the days booked, i.e. – the guest is arriving on Wednesday and departing on Sunday with a rate increase over the weekend, this option can be used to request a deposit percentage of the average daily rate. Enter the deposit percentage in the percentage/dollar amount field in the bottom left-hand corner of the form. With this radio button selected and 50% entered, a guest with an average daily rate of $100 would be required to submit a $50 deposit. |
| % of 1st Day | The requested deposit percentage is calculated based on the first day's rate. Enter the deposit percentage in the percentage/dollar amount field in the bottom left-hand corner of the form. |
| % of Last Day | The requested deposit percentage is calculated based on the last day's rate. Enter the deposit percentage in the percentage/dollar amount field in the bottom left-hand corner of the form. |
| FIXED AMOUNT | The RezStream Booking Engine deposit amount will be based on a fixed dollar amount. Enter the dollar amount in the percentage/dollar amount field in the bottom left-hand corner of the form. |
| Include Tax? | With this option selected, all deposits based on daily rates will be calculated at the room rate PLUS tax. |
| Calculate Single Day at 100% | For single day reservations, payment in full is required. This option can be selected in addition to one of the online booking settings listed above. |
| Percentage/Dollar Amount Field | Enter the online deposit percentage or dollar amount. |

# DESIGN HEADER

From the RezStream Booking Engine Online Administrative Interface, click Property > Booking Engine Settings > Design Header to customize the RezStream Booking Engine's header section. An example of the header section is displayed below.

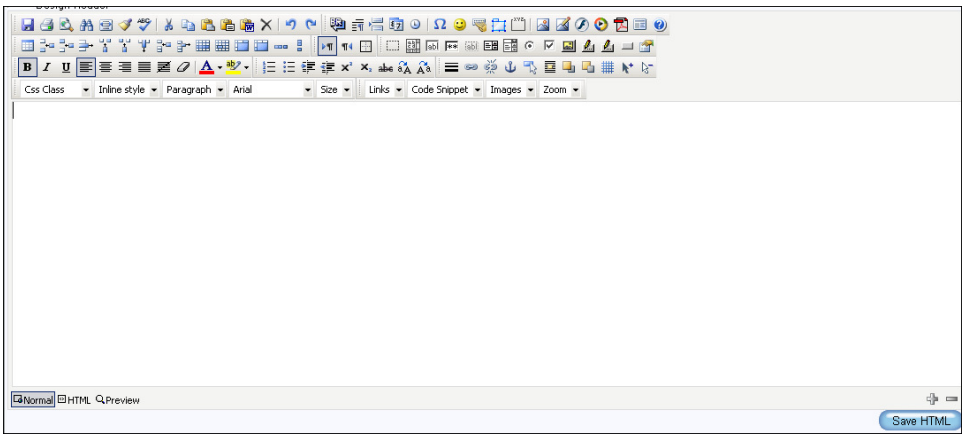



Text displayed in the header is displayed throughout the online booking process. Therefore, text entered in the header should be general in nature, describing the property. In addition to text, hyperlinks and images can be displayed in the header. Hyperlinks are clickable text and/or images that re-direct the Internet guest to another web page. By default, hyperlinks are displayed as underlined text. In the sample above, the text "The Cliffhanger Resort" is a hyperlink. When a guest clicks this text, he is re-directed to the property's website home page (http://www.chr.com).

Use the following steps for customizing the RezStream Booking Engine header.

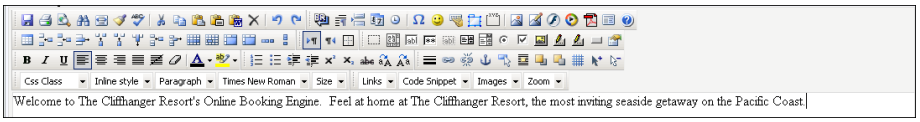
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Design Header tab. The RezStream Booking Engine Online Administrative Interface HTML editor is displayed.

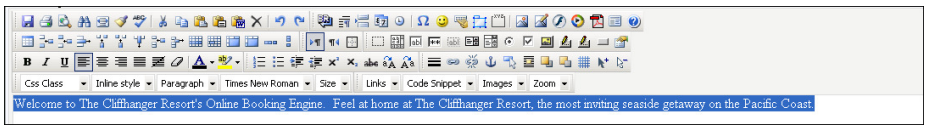


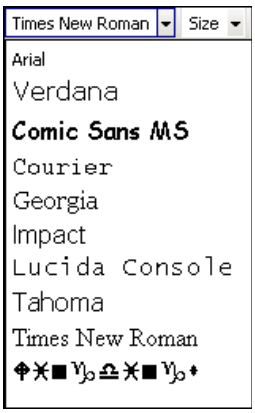
3. In our example, the HTML editor will be used for entering text, special formatting, and inserting a hyperlink. An overview of these tasks follows.

   a. To enter text that will display in the RezStream Booking Engine header, simply type the text as you would in a word processing program.

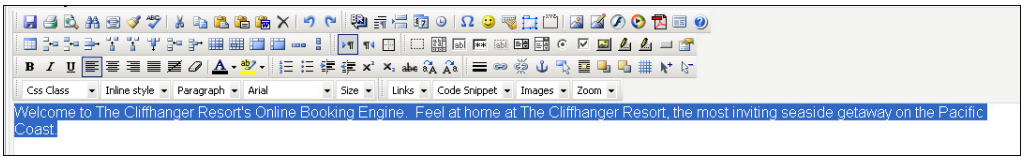

Welcome to The Cliffhanger Resort's Online Booking Engine. Feel at home at The Cliffhanger Resort, the most inviting seaside getaway on the Pacific Coast.

      i. To update the font style for text entered, highlight the text and select a font style from the font drop-down menu.

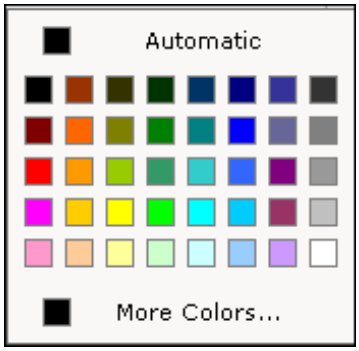

Welcome to The Cliffhanger Resort's Online Booking Engine. Feel at home at The Cliffhanger Resort, the most inviting seaside getaway on the Pacific Coast.



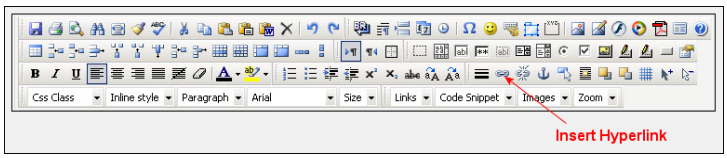

      ii. To apply special formatting to the text (bold, italics, or underlines), select the text and click the applicable formatting button.


Welcome to The Cliffhanger Resort's Online Booking Engine. Feel at home at The Cliffhanger Resort, the most inviting seaside getaway on the Pacific Coast.

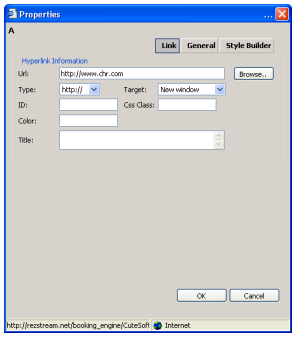
      iii. To change the color of the text, keep the text highlighted and click the Select Font Color toolbar button ( ). Select a color from the grid.



iv. To create hyperlinked text, highlight the section of text that will display as a hyperlink and click the Insert Hyperlink toolbar button ( ).

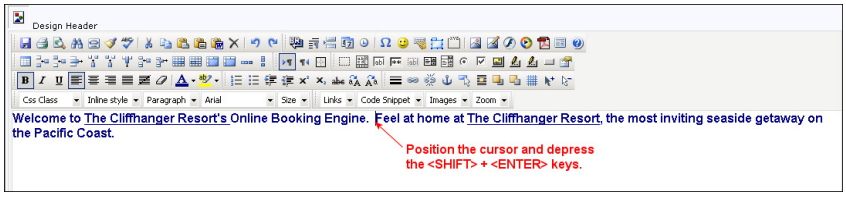


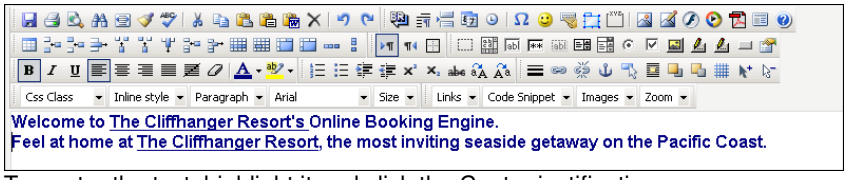

The Properties window displays where a URL can be entered. A URL is the Internet address where the guest will be directed when the text is clicked.



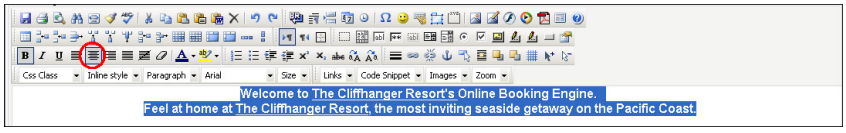

The Target field can be used to determine whether or not a new browser window is launched when an Internet guest clicks the hyperlink.

v. To add line breaks, simply position the cursor at the desired break point and depress the <SHIFT> + <ENTER> keys.


Design Header
Welcome to The Cliffhanger Resort's Online Booking Engine. Feel at home at The Cliffhanger Resort, the most inviting seaside getaway on the Pacific Coast.
Position the cursor and depress the <SHIFT> + <ENTER> keys.


Welcome to The Cliffhanger Resort's Online Booking Engine.
Feel at home at The Cliffhanger Resort, the most inviting seaside getaway on the Pacific Coast.

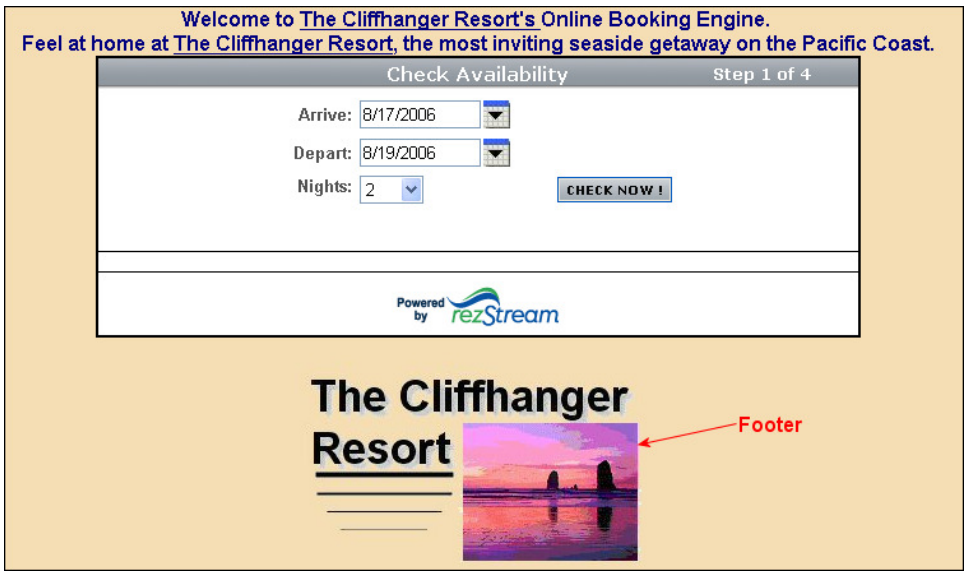
vi. To center the text, highlight it and click the Center justification button ( ).


Welcome to The Cliffhanger Resort's Online Booking Engine.
Feel at home at The Cliffhanger Resort, the most inviting seaside getaway on the Pacific Coast.

4. In the HTML editor, click the Save HTML button.

# DESIGN FOOTER

Text and/or images displayed in the footer are displayed throughout the online booking process. Therefore, text entered in the footer should be general in nature, describing the property. In addition to text, hyperlinks and images can be displayed in the footer. An example of the footer section is displayed below.


Welcome to The Cliffhanger Resort's Online Booking Engine.
Feel at home at The Cliffhanger Resort, the most inviting seaside getaway on the Pacific Coast.
Check Availability
Step 1 of 4
Arrive: 8/17/2006
Depart: 8/19/2006
Nights: 2
CHECK NOW !
Powered by rezStream
The Cliffhanger Resort
Footer

Use the following steps for customizing the RezStream Booking Engine footer.

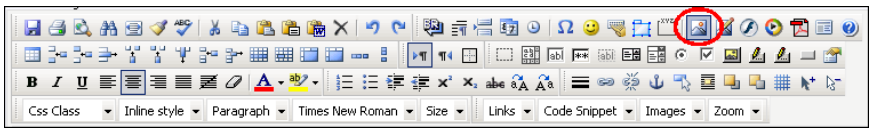
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Design Footer tab. The RezStream Booking Engine Online Administrative Interface HTML editor is displayed.

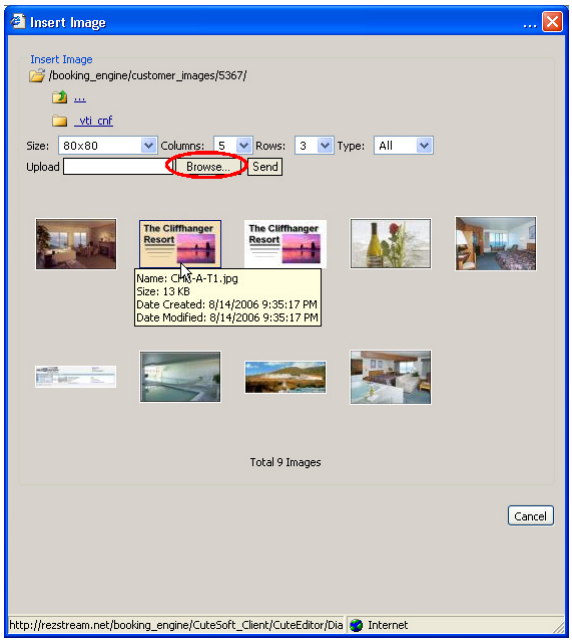
3. In our example, the HTML editor will be used for inserting a graphic and a hyperlink.

   a. To insert a graphic that is centered in the footer, click the Center justification button ( ) on the top toolbar.

   b. Click the Insert Image button ( ) on the top toolbar.

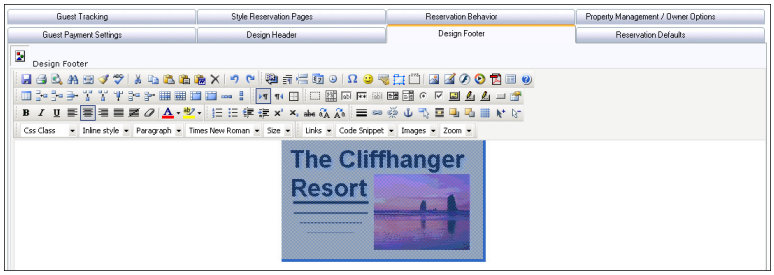


i. The Insert Image window is displayed. Click the image that will be inserted into the footer section. Images that were previously uploaded to the RezStream Booking Engine Online Administrative Interface are displayed. If necessary, additional images can be uploaded using the Browse button.

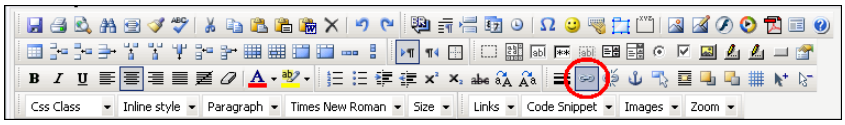



c. Next, we will add a hyperlink to the image. By adding a hyperlink, Internet guests will be re-directed to the property's website when they click on the image.

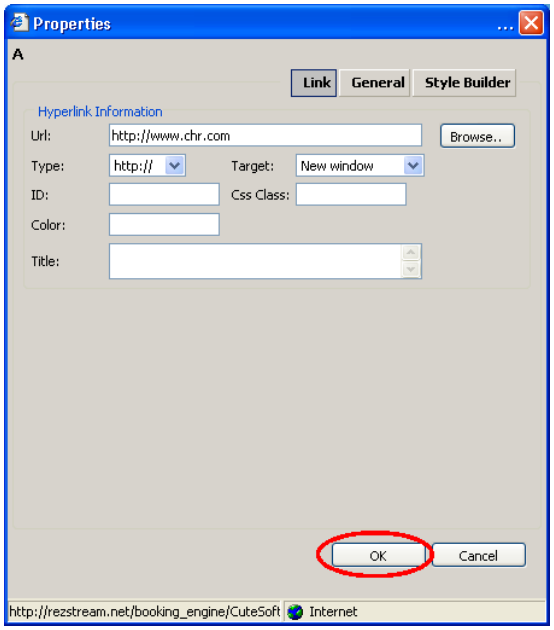
i. Highlight the image.



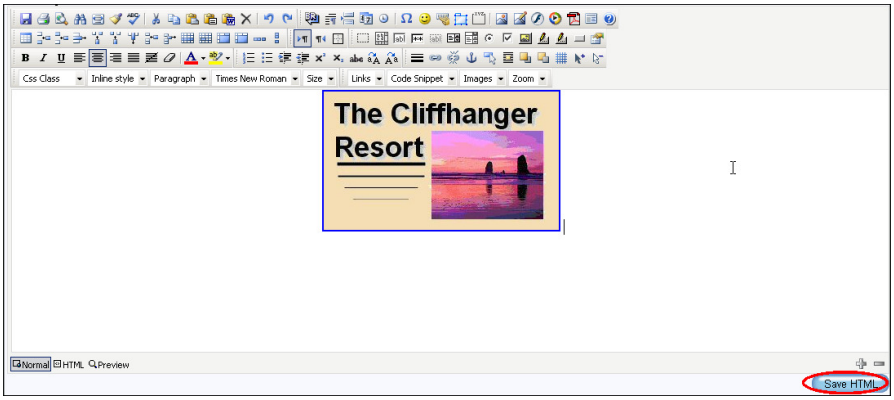

ii. Click the Insert Hyperlink button ( ) on the top toolbar.



iii. Complete the hyperlink Properties window and click the OK button.




d. Click the Save HTML button.




## RESERVATION DEFAULTS

The following settings are stored in the Property > Booking Engine Settings > Reservation Defaults tab.

1. The setting that determines how the RezStream Booking Engine reacts when an Internet guest searches for a room and there are no rooms available.
2. Settings for the default number of adults, children, and length of stay.
3. The setting that defines the maximum number of days, weeks, months, or years in the future in which online bookings will be accepted.
4. The minimum number of days (from the current date) in which online reservations are accepted.
5. The setting that determines how reservation sources & reasons will be selected or assigned to online bookings.
6. The setting that determines the amount of detail displayed to guests when viewing reservation charges online.

## *When No Availability is Returned*

Use the following steps to define how the RezStream Booking Engine should react when online guests search for rooms during sold out dates.

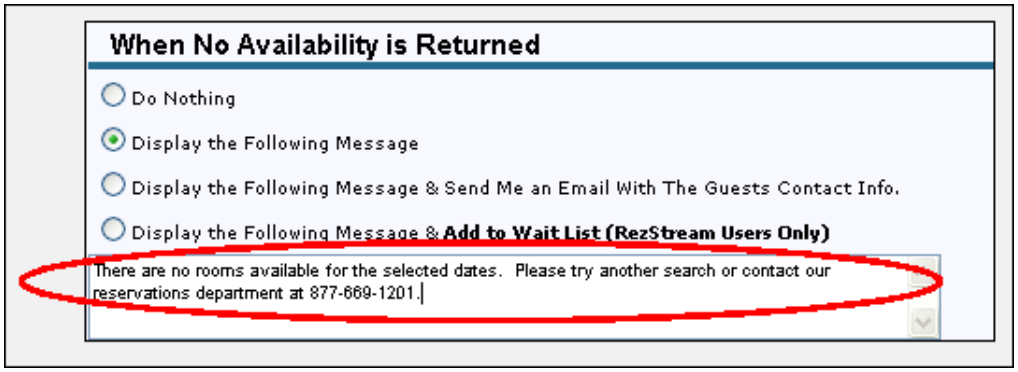
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.
2. Click the Reservation Defaults tab.
3. In the When No Availability is Returned section, select one of four options.

When No Availability is Returned
Do Nothing
Display the Following Message
Display the Following Message & Send Me an Email With The Guests Contact Info.
Display the Following Message & Add to Wait List (RezStream Users Only)
There are no rooms available for the selected dates. Please try another search or contact our reservations department at 877-669-1201.

Each option is described in the following table.

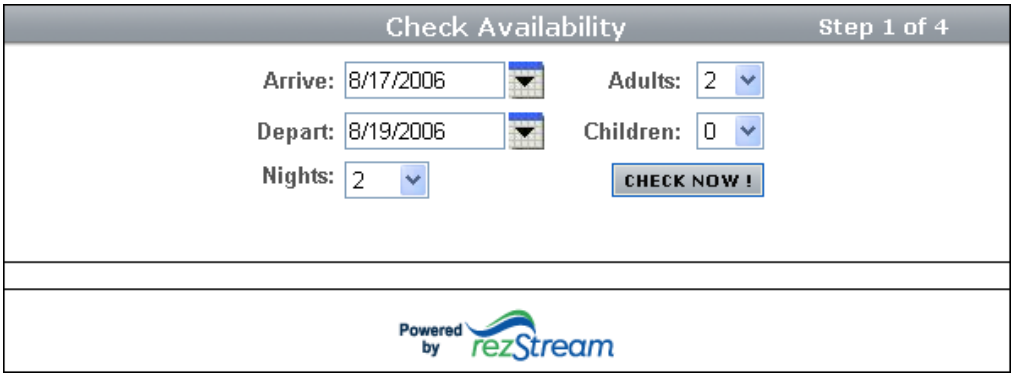
| OPTION | DESCRIPTION |
|---|---|
| Do Nothing | The Internet guest only sees that there are no rooms available. The guest must then search for a room using different arrival and departure dates. |
| Display the Following Message | A message can be entered that will display when an Internet guest searches for a room during a sold out period. When this option is selected, a text box is displayed in the "When No Availability is Returned" form. Use the text box prompt for entering a "sold out" message. |
| Display the Following Message & Send Me an Email with the Guest's Contact Info. | With this option selected, a "sold out" message can be entered in the text box. This message is displayed when a guest searches for a room during sold out dates. In addition to displaying the sold out message, the guest's contact information is emailed to the property contact. |
| Display the Following Message and Add to Wait List (RezStream Users Only) | As with the previous setting, a "sold out" message can be entered in the text box. This message is displayed when a guest searches for a room during sold out dates. In addition to displaying the sold out message, the guest is added to the wait list for the requested arrival and departure dates. |

***If any of the "Display the Following Message" options are selected, a field appears where a detailed text message can be entered.***


When No Availability is Returned
Do Nothing
Display the Following Message
Display the Following Message & Send Me an Email With The Guests Contact Info.
Display the Following Message & Add to Wait List (RezStream Users Only)
There are no rooms available for the selected dates. Please try another search or contact our reservations department at 877-669-1201.

## *Online Booking Defaults*

The Internet guest's first step in booking an online reservation is to enter arrival and departure dates along with the number of adults and children in the party. This information is entered in the Check Availability form.

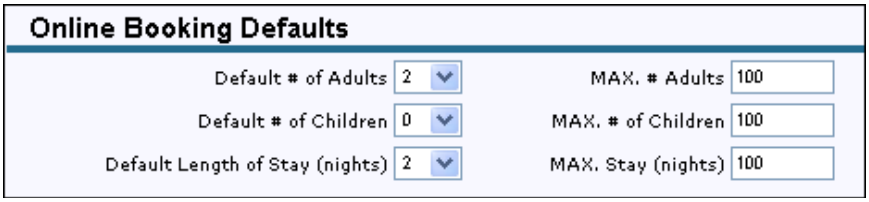



Default values can be specified for the number of adults, children, and number of nights. Use the following steps for setting these default values.

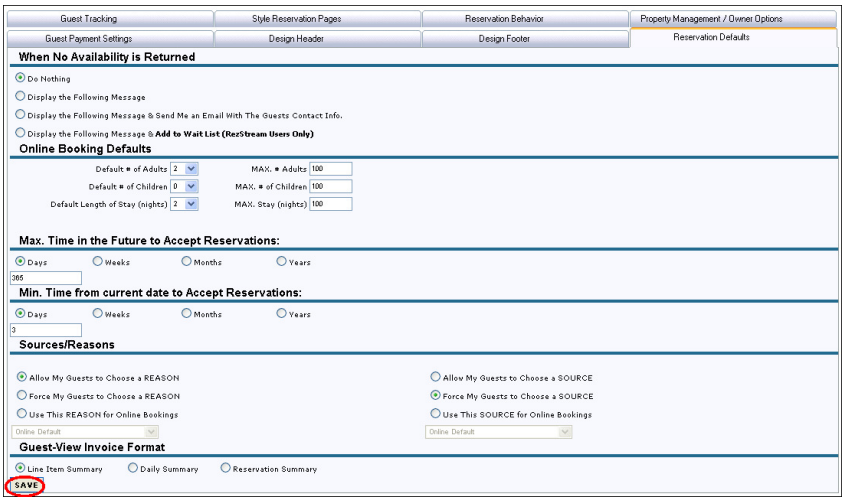
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Reservation Defaults tab.

3. In the Online Booking Defaults section, use the drop-down menus to specify the default number of adults, the default number of children, and the default length of stay (nights). In addition, specify the maximum number of adults and children as well as the maximum stay length (number of nights) for online reservations.


Online Booking Defaults
Default # of Adults 2
Default # of Children 0
Default Length of Stay (nights) 2
MAX. # Adults 100
MAX. # of Children 100
MAX. Stay (nights) 100

4. Click the Save button at the bottom of the Reservation Defaults page.


Guest Tracking
Style Reservation Pages
Reservation Behavior
Property Management / Owner Options
Guest Payment Settings
Design Header
Design Footer
Reservation Defaults
When No Availability is Returned
Do Nothing
Display the Following Message
Display the Following Message & Send Me an Email With The Guests Contact Info.
Display the Following Message & Add to Wait List (RezStream Users Only)
Online Booking Defaults
Default # of Adults
MAX. # Adults
Default # of Children
MAX. # of Children
Default Length of Stay (nights)
MAX. Stay (nights)
Max. Time in the Future to Accept Reservations:
Days
Weeks
Months
Years
365
Min. Time from current date to Accept Reservations:
Sources/Reasons
Allow My Guests to Choose a REASON
Force My Guests to Choose a REASON
Use This REASON for Online Bookings
Allow My Guests to Choose a SOURCE
Force My Guests to Choose a SOURCE
Use This SOURCE for Online Bookings
Guest-View Invoice Format
Line Item Summary
Daily Summary
Reservation Summary
SAVE

## *Max. Time in the Future to Accept Reservations*

Use the "Max. Time in the Future to Accept Reservations" link for defining the amount of time in the future for which online bookings will be accepted. This can be a number of days, weeks, months, or years. Use the following steps for defining this timeframe.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Reservation Defaults tab.

3. Under the "Max. Time in the Future to Accept Reservations" heading, select a radio button for a unit of time (days, weeks, months, or years) and then enter the number of days, weeks, months, or years in which online bookings will be accepted.

## *Min. Time from current date to Accept Reservations*

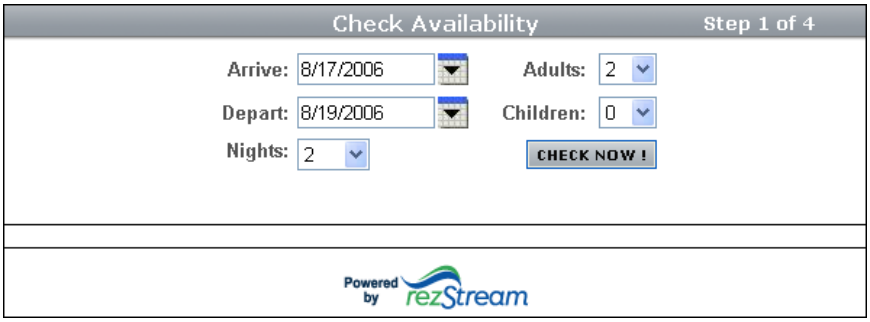
In order to reduce confusion at the front desk, a property could configure the RezStream Booking Engine so that online reservations are not accepted for guests arriving on the current date, or guests arriving one or two days from the current date. Use the following steps for defining the "Min. Time from current date to Accept Reservations" setting.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Reservation Defaults tab.

3. Under the "Min. Time from current date to Accept Reservations" heading, select a radio button for a unit of time (days, weeks, months, or years) and then enter the number of days, weeks, months, or years from the current date in which online reservations will be accepted.

In this example, if today's date is 8/14/2006 and the "Min. Time from current date to Accept Reservations" is set at 3 days, the Check Availability form arrival date would default to 8/17/2006.




## *Sources/Reasons*

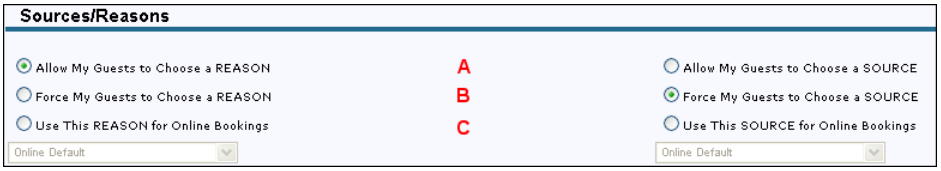
Sources are used for determining how Internet guests found out about your property. Reasons describe why an Internet guest is visiting your property. When used effectively, sources and reasons can identify successful advertising campaigns and profitable market segments.

There are three options available for determining how the RezStream Booking Engine handles sources/reasons for online bookings. Use the following steps for selecting an option.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Reservation Defaults tab.

3. Under the Sources/Reasons heading, choose a radio button on the left for REASONS and one on the right for SOURCES.


Sources/Reasons
Allow My Guests to Choose a REASON
Force My Guests to Choose a REASON
Use This REASON for Online Bookings
Online Default
A
B
C
Allow My Guests to Choose a SOURCE
Force My Guests to Choose a SOURCE
Use This SOURCE for Online Bookings
Online Default

A. Allow My Guests to Choose a REASON (or SOURCE). Using this option, the Internet guests are prompted for how they found out about the property and why they are visiting. However, with this option, the Internet guest is not required to select a SOURCE or REASON.
B. Force My Guests to Choose a REASON (or SOURCE). Force the Internet guest to select a Source and Reason. With this option, the Internet guest cannot bypass these fields.

C. Use this REASON (or SOURCE) for all online bookings. With this radio button selected, the drop-down list becomes active and a SOURCE/REASON can now be selected. This SOURCE/REASON will be assigned to every RezStream Booking Engine reservation without prompting the guest for information.

***Sources & reasons are uploaded from RezStream Professional to the RezStream Booking Engine.***

## *Guest-View Invoice Format*

The RezStream Booking Engine's invoice can be customized based on the amount of detail that is displayed on guest invoices. Guest invoices, based on estimated charges, are displayed during the booking process.

Use the following steps for customizing guest invoices in the RezStream Booking Engine.

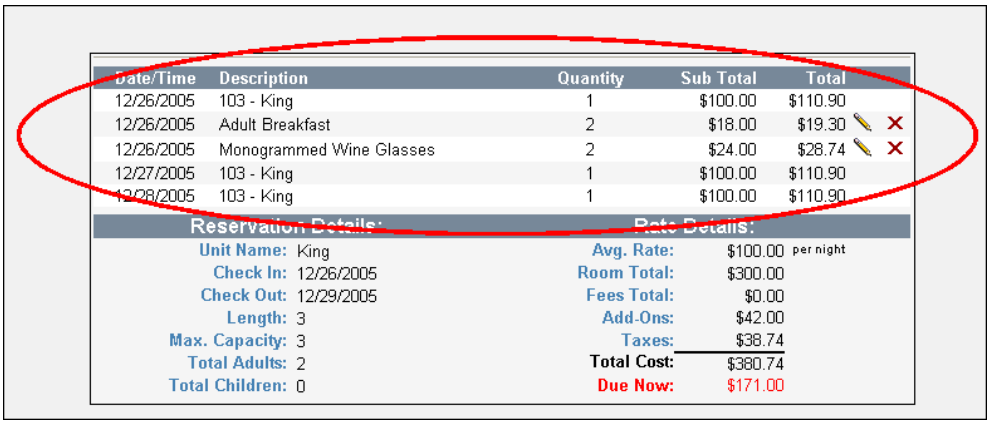
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Reservation Defaults tab.

3. Under the Guest-View Invoice Format heading, select one of the invoice formats. A brief description of each follows.
   A. Line Item Summary. Each charge is displayed on the guest invoice.
   B. Daily Summary. The guest views an invoice that sub-totals charges by day.
   C. Reservation Summary. The guest invoice displays one total for the entire reservation.

Samples of each guest-view invoice format are displayed below.

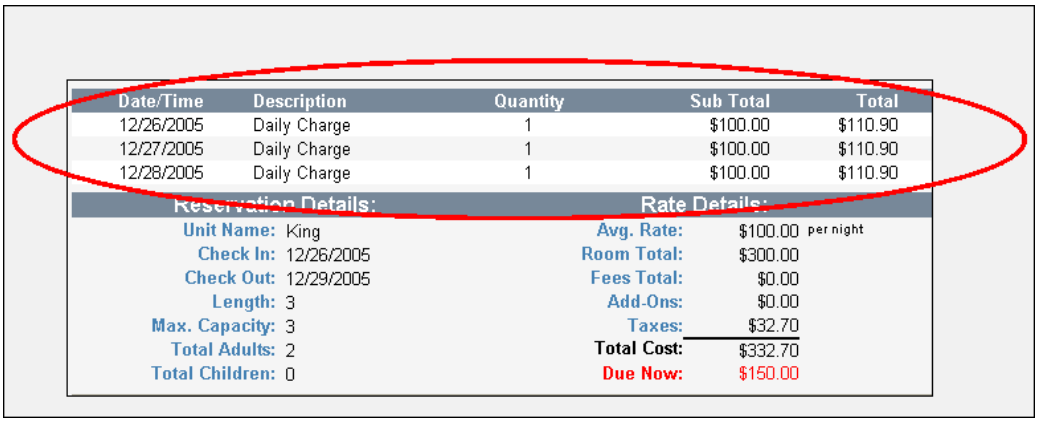
### Line Item Summary



| Date/Time | Description | Quantity | Sub Total | Total |
|---|---|---|---|---|
| 12/26/2005 | 103 - King | 1 | $100.00 | $110.90 |
| 12/26/2005 | Adult Breakfast | 2 | $18.00 | $19.30 |
| 12/26/2005 | Monogrammed Wine Glasses | 2 | $24.00 | $28.74 |
| 12/27/2005 | 103 - King | 1 | $100.00 | $110.90 |
| 12/28/2005 | 103 - King | 1 | $100.00 | $110.90 |

| Reservation Details: | | Rate Details: | |
|---|---|---|---|
| Unit Name: | King | Avg. Rate: | $100.00 per night |
| Check In: | 12/26/2005 | Room Total: | $300.00 |
| Check Out: | 12/29/2005 | Fees Total: | $0.00 |
| Length: | 3 | Add-Ons: | $42.00 |
| Max. Capacity: | 3 | Taxes: | $38.74 |
| Total Adults: | 2 | Total Cost: | $380.74 |
| Total Children: | 0 | Due Now: | $171.00 |

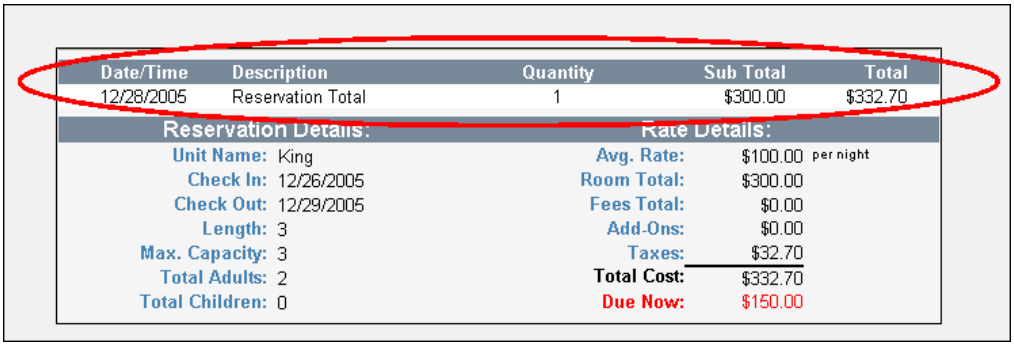
### Daily Summary



| Date/Time | Description | Quantity | Sub Total | Total |
|---|---|---|---|---|
| 12/26/2005 | Daily Charge | 1 | $100.00 | $110.90 |
| 12/27/2005 | Daily Charge | 1 | $100.00 | $110.90 |
| 12/28/2005 | Daily Charge | 1 | $100.00 | $110.90 |

| Reservation Details: | | Rate Details: | |
|---|---|---|---|
| Unit Name: | King | Avg. Rate: | $100.00 per night |
| Check In: | 12/26/2005 | Room Total: | $300.00 |
| Check Out: | 12/29/2005 | Fees Total: | $0.00 |
| Length: | 3 | Add-Ons: | $0.00 |
| Max. Capacity: | 3 | Taxes: | $32.70 |
| Total Adults: | 2 | Total Cost: | $332.70 |
| Total Children: | 0 | Due Now: | $150.00 |

### Reservation Summary



| Date/Time | Description | Quantity | Sub Total | Total |
|---|---|---|---|---|
| 12/28/2005 | Reservation Total | 1 | $300.00 | $332.70 |

| Reservation Details: | | Rate Details: | |
|---|---|---|---|
| Unit Name: | King | Avg. Rate: | $100.00 per night |
| Check In: | 12/26/2005 | Room Total: | $300.00 |
| Check Out: | 12/29/2005 | Fees Total: | $0.00 |
| Length: | 3 | Add-Ons: | $0.00 |
| Max. Capacity: | 3 | Taxes: | $32.70 |
| Total Adults: | 2 | Total Cost: | $332.70 |
| Total Children: | 0 | Due Now: | $150.00 |

# GUEST TRACKING

There are several options for tracking guest activity on your website and the RezStream Booking Engine. RezStream offers tracking through the RezStream Tracker™.

## *RezStream Tracker Settings*

The RezStream Tracker™ can be used to accumulate a host of statistics about visitor traffic on your website. This feature tracks the amount of time visitors spend on each page as well as how much time they spend in the RezStream Booking Engine. In addition, statistics can be generated that can help determine when guests are abandoning the online reservation process. This information can help you make changes to the RezStream Booking Engine in order to generate more online revenue.

***For additional information on the RezStream Tracker™, please contact RezStream sales at 866-360-8210.***

# STYLE RESERVATION PAGES

The RezStream Booking Engine's background and default font colors, font style, and font size can be customized in the Style Reservation Pages link. Use the following steps for setting these defaults.

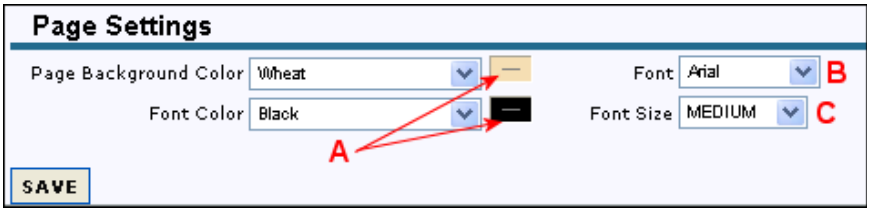
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Booking Engine Settings link.

2. Click the Style Reservation Pages tab.

3. In the Page Settings form, set the following options.
   A. Select a default page background color from the drop-down menu. After selecting a color, a preview (A) is displayed next to the drop-down list. Use the same procedure for selecting the default font color.

   B. Select a font from the drop-down menu (B).

   C. Set a font size from the drop-down menu (C).



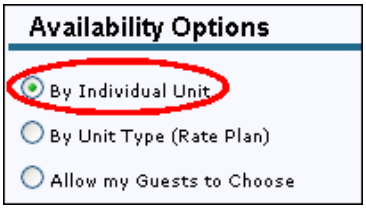

4. Click the Save button.

# RESERVATION BEHAVIOR

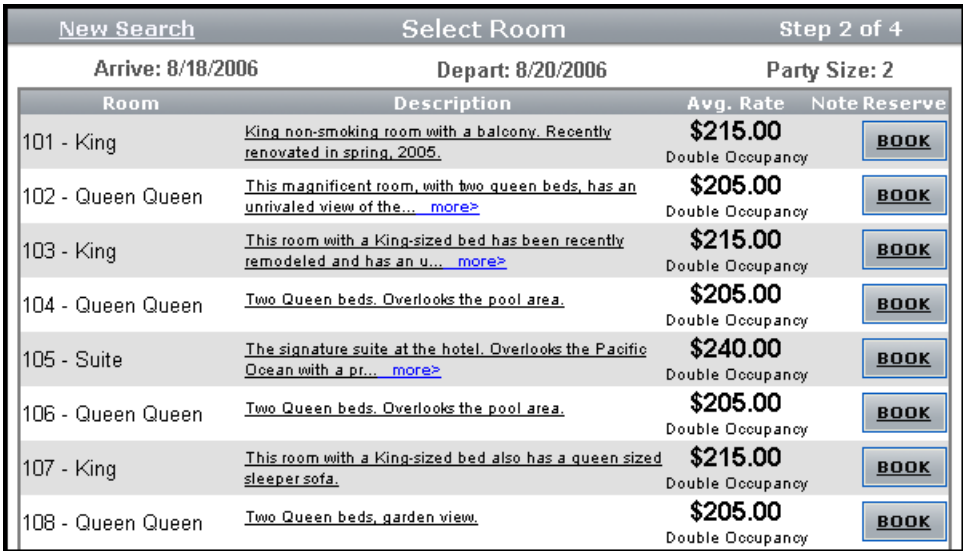
The reservation behavior settings control several RezStream Booking Engine settings including how availability will be returned, which room rates that will be displayed to online guests, whether or not packages and point of sale items will be sold online, and defaults for date and currency displays.

## *Availability Options*

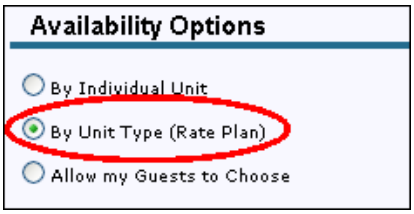
From the RezStream Booking Engine Online Administrative Interface, select Property > Booking Engine Settings and click the Reservation Behavior tab. Under the Availability Options heading, there are three options that define how the RezStream Booking Engine displays availability.

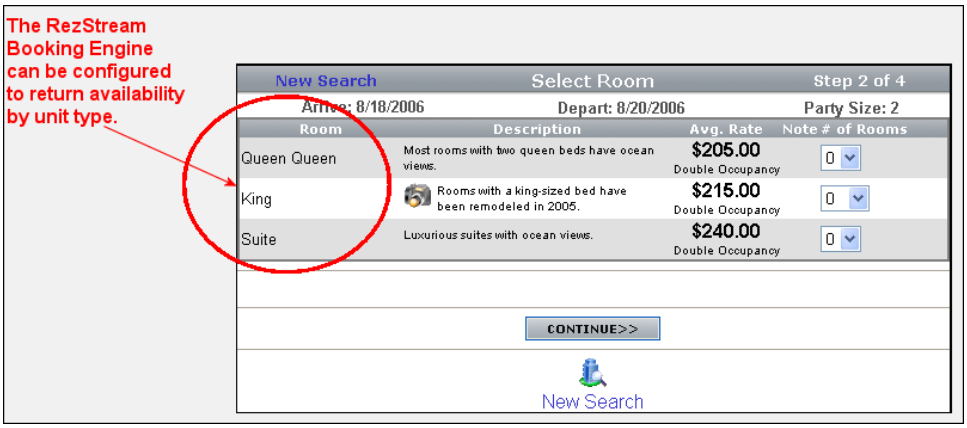



The RezStream Booking Engine default setting is to display availability by individual unit. With this option selected, the Internet guest enters arrival and departure dates. Next, a list of specific available individual rooms is displayed.



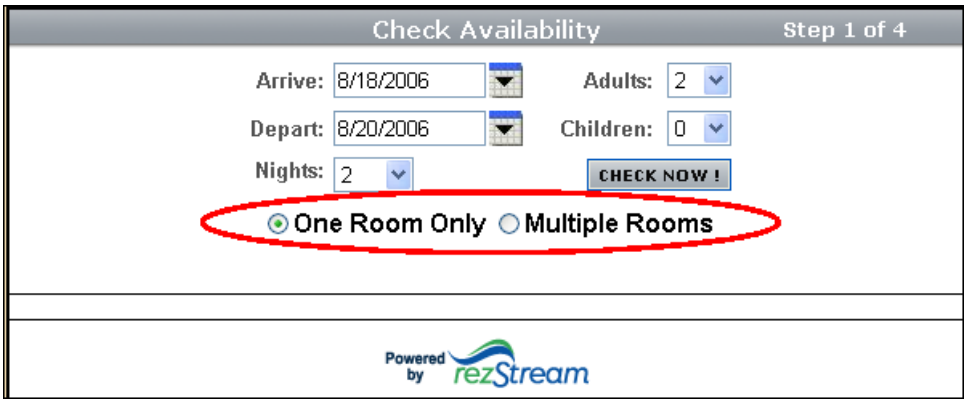

With the second option selected, By Unit Type (Rate Plan), a form displaying a list of available unit types (rate plans), not a specific room number or room name, is displayed after the guest enters arrival and departure dates.





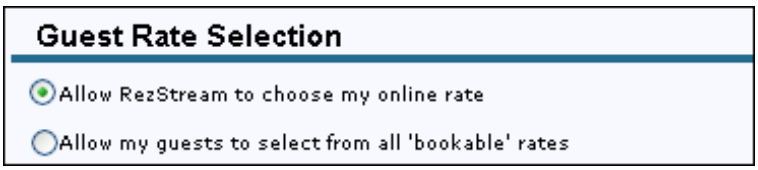

***If your property intends to use this second option, rate plans should describe room types. With descriptive rate plans, an Internet guest making a reservation via the RezStream Booking Engine will be able to easily identify the types of accommodations available at your property.***

The third option, Allow my Guests to Choose, displays two additional radio buttons on the Check Availability form allowing guests to specify if they are booking "One Room Only" or "Multiple Rooms."




## *Guest Rate Selection*

From the RezStream Booking Engine Online Administrative Interface, select Property > Booking Engine Settings and click the Reservation Behavior tab. Under the Guest Rate Selection heading, there are two options for displaying rates to Internet guests using the RezStream Booking Engine.



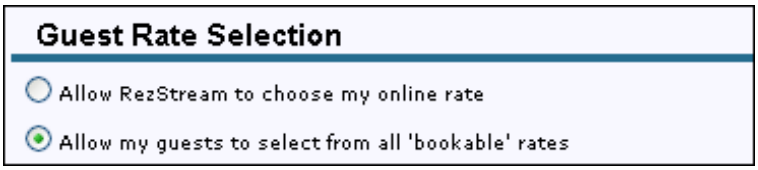

With the first option selected, Allow RezStream to choose my online rate, the first rate defined in the RezStream Professional Unit Rate Plans window (Tools > Unit and Rate Setup) is displayed to Internet guests during the reservation process.

In the example below, the Rack rate name and corresponding seasonal rates would be displayed to Internet guests.

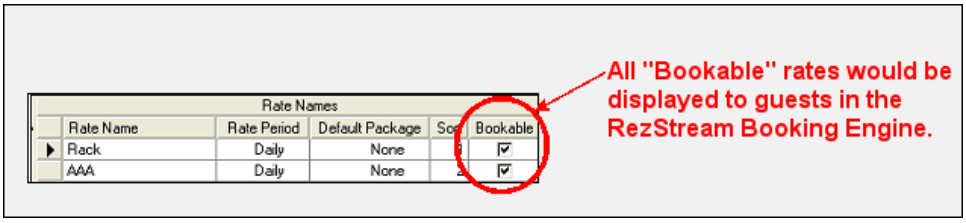
Rate Names

| Rate Name | Rate Period | Default Package | Sort | Bookable |
|---|---|---|---|---|
| Rack | Daily | None | 1 | ☑ |
| AAA | Daily | None | 2 | ☐ |

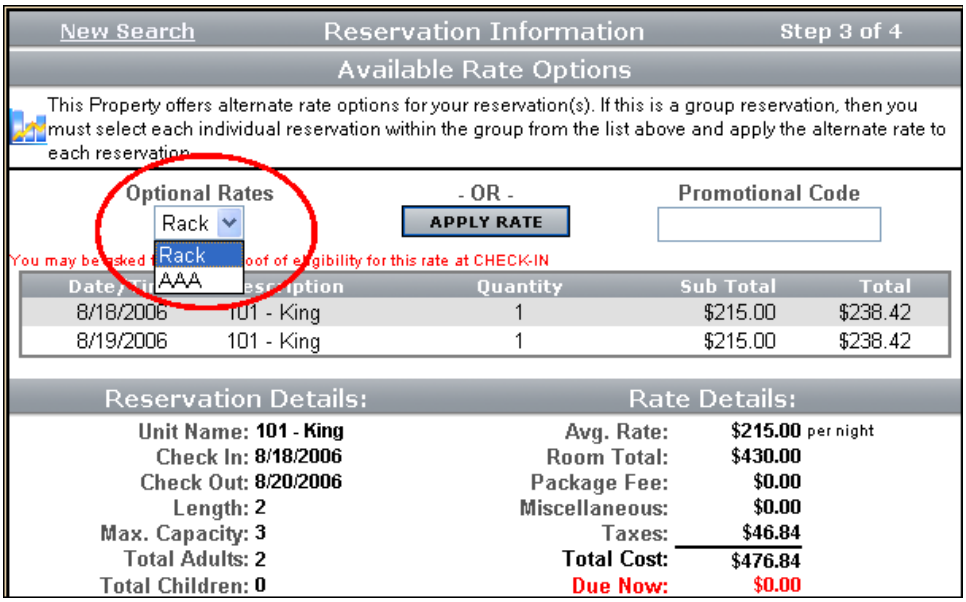
The second option, Allow my guests to select from all 'bookable' rates, gives Internet guests a choice of online rates.




With this option selected, guests are able to select from all bookable rates. In our example, Internet guests would see both the Rack and AAA rate names and their corresponding seasonal rates.



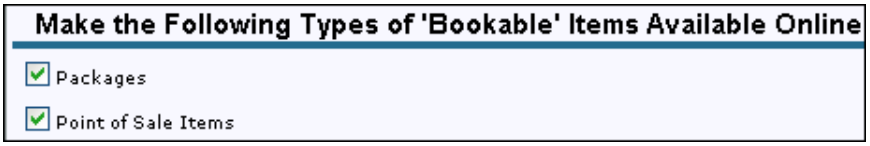

A sample Reservation Information page is displayed below. The Optional Rates drop-down field is now active and can be utilized by online guests in the Available Rate Options screen.



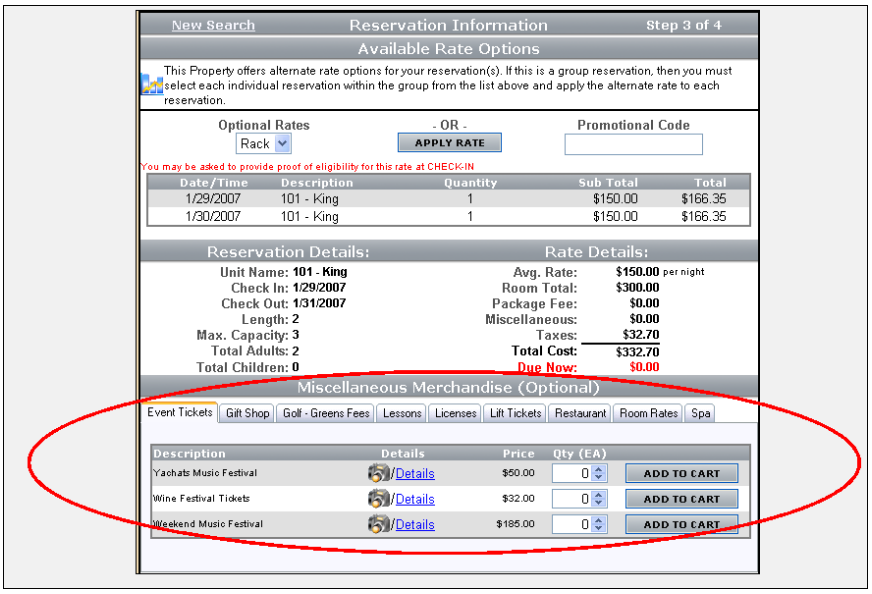
## *Make the Following Types of 'Bookable' Items Available Online*

From the RezStream Booking Engine Online Administrative Interface, select Property > Booking Engine Settings and click the Reservation Behavior tab to determine whether or not packages and point of sale items are available for Internet guests to book/purchase via the RezStream Booking Engine.

To make a bookable item available online, enter a checkmark next to the appropriate item.

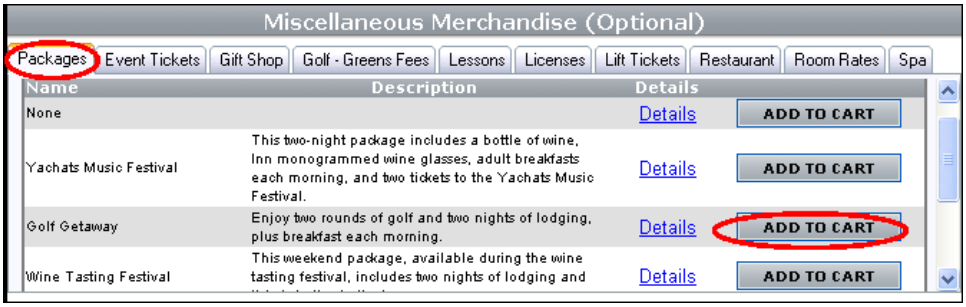



With point of sale items checked on, the "Miscellaneous Merchandise" section is included when an online guest is booking a reservation.


New Search
Reservation Information
Step 3 of 4
Available Rate Options
This Property offers alternate rate options for your reservation(s). If this is a group reservation, then you must select each individual reservation within the group from the list above and apply the alternate rate to each reservation.
Optional Rates
Rack
- OR -
APPLY RATE
Promotional Code
You may be asked to provide proof of eligibility for this rate at CHECK-IN
Date/Time Description Quantity Sub Total Total
1/29/2007 101 - King 1 $150.00 $166.35
1/30/2007 101 - King 1 $150.00 $166.35
Reservation Details:
Unit Name: 101 - King
Check In: 1/29/2007
Check Out: 1/31/2007
Length: 2
Max. Capacity: 3
Total Adults: 2
Total Children: 0
Rate Details:
Avg. Rate: $150.00 per night
Room Total: $300.00
Package Fee: $0.00
Miscellaneous: $0.00
Taxes: $32.70
Total Cost: $332.70
Due Now: $0.00
Miscellaneous Merchandise (Optional)
Event Tickets
Gift Shop
Golf - Greens Fees
Lessons
Licenses
Lift Tickets
Restaurant
Room Rates
Spa
Description Details Price Qty (EA)
Yachats Music Festival /Details $50.00 0 ADD TO CART
Wine Festival Tickets /Details $32.00 0 ADD TO CART
Weekend Music Festival /Details $185.00 0 ADD TO CART

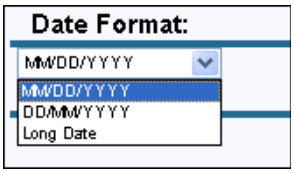
The tabs in the Miscellaneous Merchandise section represent the different RezStream Professional point of sale categories. Each point of sale item flagged as Bookable in RezStream Professional displays in the RezStream Booking Engine Miscellaneous Merchandise section.

With packages checked on, the "Miscellaneous Merchandise" section includes a Packages tab. Here, the online guest can select a package by clicking the "Add to Cart" button.


Miscellaneous Merchandise (Optional)
Packages
Event Tickets
Gift Shop
Golf - Greens Fees
Lessons
Licenses
Lift Tickets
Restaurant
Room Rates
Spa
Name Description Details
None Details ADD TO CART
Yachats Music Festival This two-night package includes a bottle of wine, Inn monogrammed wine glasses, adult breakfasts each morning, and two tickets to the Yachats Music Festival. Details ADD TO CART
Golf Getaway Enjoy two rounds of golf and two nights of lodging, plus breakfast each morning. Details ADD TO CART
Wine Tasting Festival This weekend package, available during the wine tasting festival, includes two nights of lodging and Details ADD TO CART

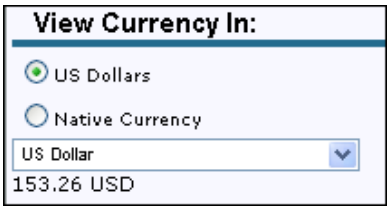
### *Date Format*

From the RezStream Booking Engine Online Administrative Interface, select Property > Booking Engine Settings and click the Reservation Behavior tab. Under the Date Format heading, specify the RezStream Booking Engine's default date format.




### *View Currency In*

From the RezStream Booking Engine Online Administrative Interface, select Property > Booking Engine Settings and click the Reservation Behavior tab. Under the View Currency In heading, specify the RezStream Booking Engine's default currency display.




The default currency display is US Dollars. To select a different currency display, select the Native Currency radio button and use the drop-down list to select the appropriate currency option.

## PROPERTY MANAGEMENT/OWNER OPTIONS

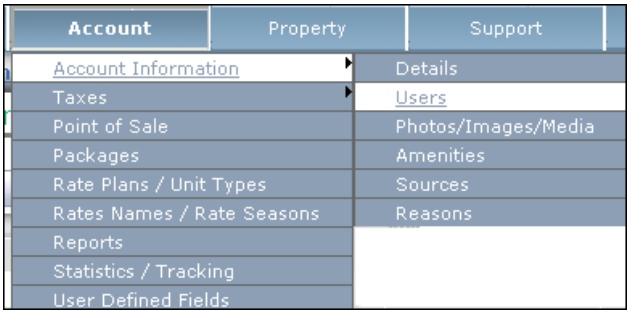
RezStream property management customers can create logins for individual property owners to access the RezStream Booking Engine Online Administrative Interface. Owners then have the ability to do one or all of the following:

- View Availability
- View Invoices
- Make Reservations
- View Guest Information
- Select Rates for Reservations

***Hotel properties that do not have individual unit owners can skip this step.***

Use the following steps to give individual unit owners access to the RezStream Booking Engine Online Administrative Interface.

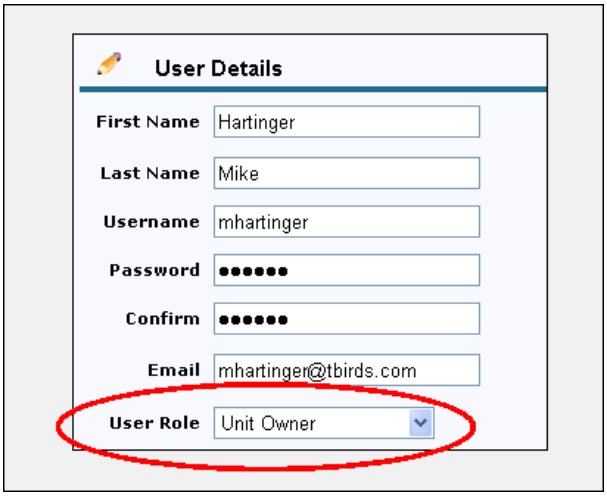
1. Click Account > Account Information > Users.



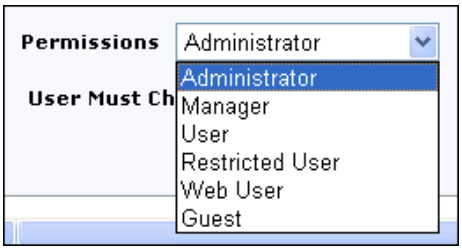

2. Click the Create New User button.

3. Complete the User Details form for each individual unit owner by entering the owner's first name, last name, username, password, and email.

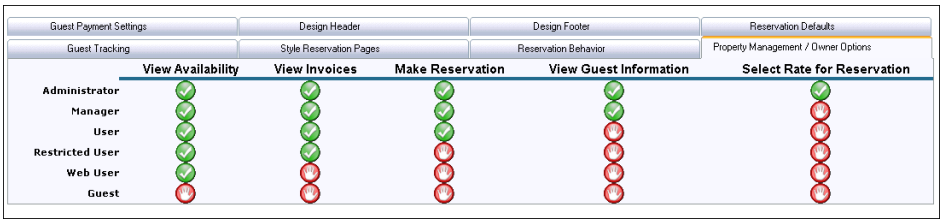
4. In the user role drop-down list, select unit owner.



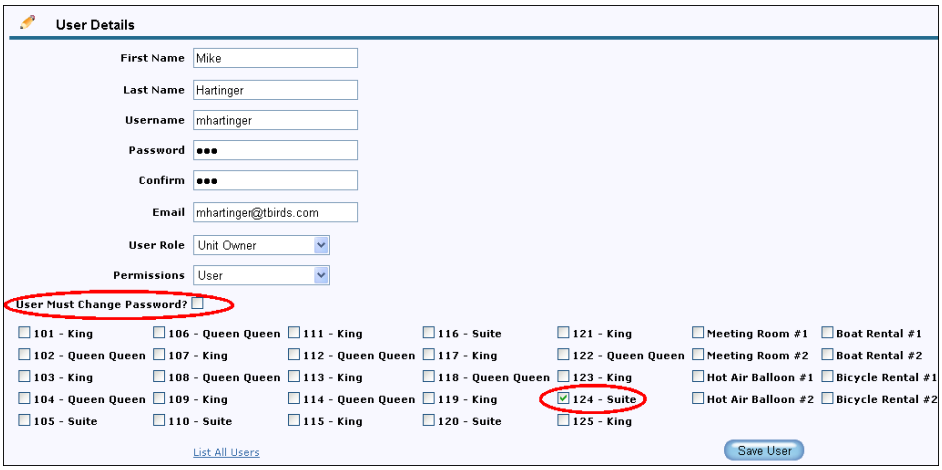
5. Use the permissions drop-down list to assign access rights to the owner.




A table that explains the permissions level settings can be viewed by clicking Property > Booking Engine Settings > Property Management/Owner Options.




6. Click the "User Must Change Password" check box if the owner should change his password the first time he logs into the RezStream Booking Engine Online Administrative Interface.

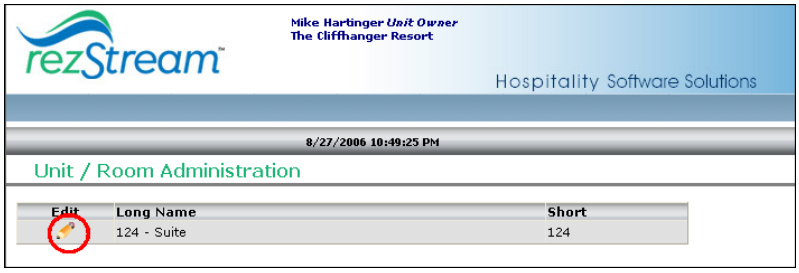



7. Enter a checkmark next to this owner's unit (124 – Suite).

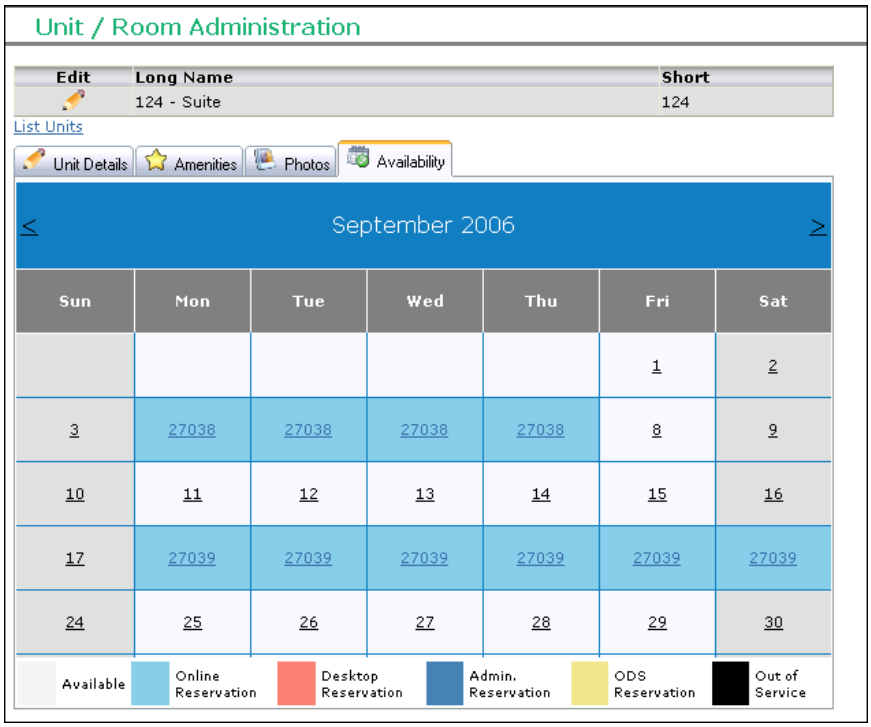
8. Click the Save User button.

The owner can now login to the RezStream Booking Engine Online Administrative Interface.

The Unit/Room Administration page specific to this owner is displayed.



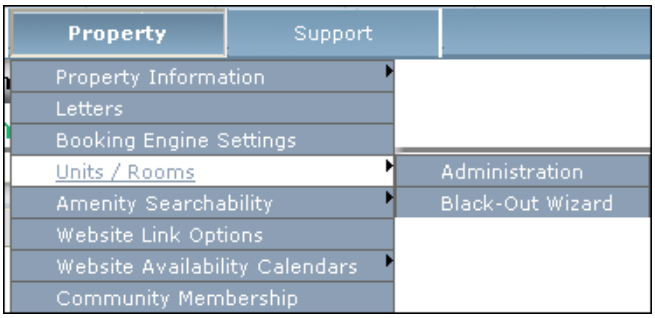

Here, the owner can click the edit icon ( ) to view his unit's availability.




***The functions available to an owner once logged into the RezStream Booking Engine Online Administrative Interface will vary based on the permissions level assigned in step #5 above.***

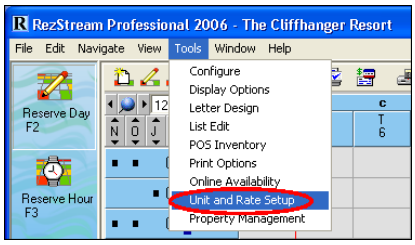
# UNITS/ROOMS

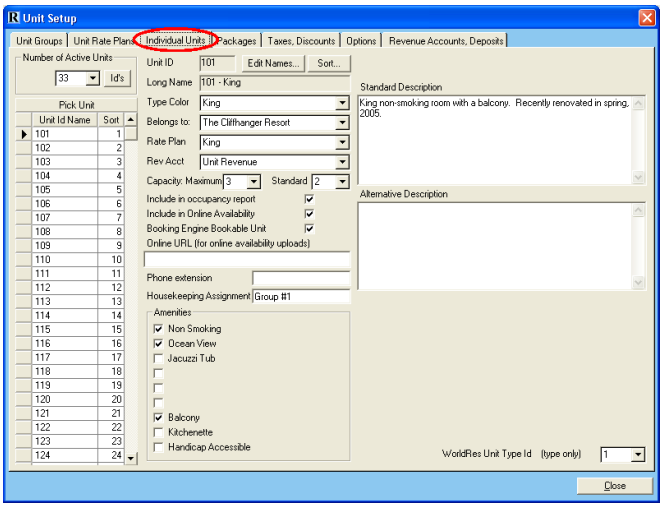
The Property > Units/Rooms > Administration and Property > Unit/Rooms links are used to view room details, assign unit amenities, assign unit photos, and specify black-out dates so that those rooms cannot be booked online via the RezStream Booking Engine during out of service dates.




## ADMINISTRATION

Units are added, edited, and deleted in RezStream Professional by clicking Tools > Unit and Rate Setup and selecting the Individual Units tab.




The information entered in the Individual Units window in RezStream Professional is transferred to the RezStream Booking Engine via the initial configuration upload.

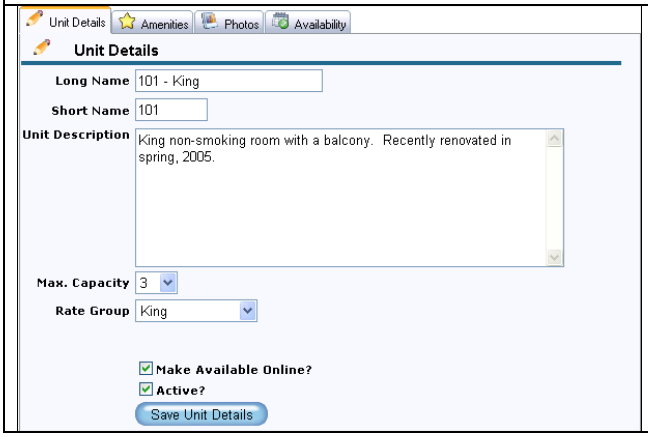
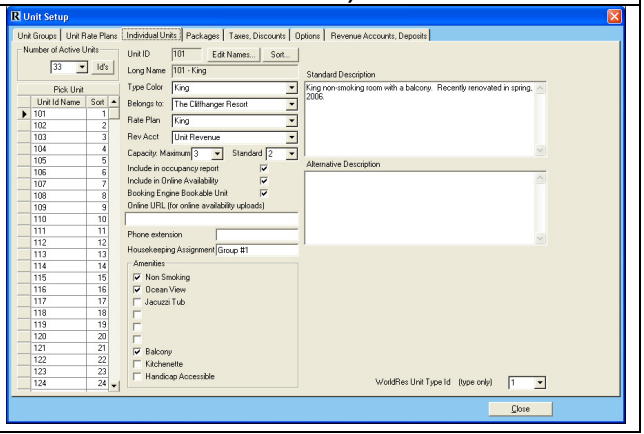
After the initial configuration upload, login to the RezStream Booking Engine Online Administrative Interface and click the Property > Units/Rooms > Administration link to view unit details, assign unit level amenities, assign unit photos, and view unit availability. This information will be accessed via four tab headings: Unit Details, Amenities, Photos, and Availability.

## *Unit Details*

After clicking Property > Units/Rooms > Administration, a table containing basic information about each unit is displayed. View specific unit details by clicking the appropriate edit icon ( ).

| Edit | Long Name | Short | Delete |
|---|---|---|---|
| | 101 - King | 101 | |
| | 102 - Queen Queen | 102 | |
| | 103 - King | 103 | |
| | 104 - Queen Queen | 104 | |
| | 105 - Suite | 105 | |
| | 106 - Queen Queen | 106 | |
| | 107 - King | 107 | |
| | 108 - Queen Queen | 108 | |
| | 109 - King | 109 | |
| | 110 - Suite | 110 | |
| | 111 - King | 111 | |
| | 112 - Queen Queen | 112 | |
| | 113 - King | 113 | |
| | 114 - Queen Queen | 114 | |
| | 115 - King | 115 | |
| | 116 - Suite | 116 | |
| | 117 - King | 117 | |
| | 118 - Queen Queen | 118 | |

After clicking the edit icon, the Unit Details form is displayed. This form contains the information previously entered in RezStream Professional.

| REZSTREAM BOOKING ENGINE (PROPERTY > UNITS/ROOMS > ADMINISTRATION) | REZSTREAM PROFESSIONAL (TOOLS > UNIT AND RATE SETUP > INDIVIDUAL UNITS) |
|---|---|
|  |  |



***Any changes to units MUST be made through RezStream Professional. After making changes to units in RezStream Professional, upload the changes to the RezStream Booking Engine by clicking File > Online Availability Update > RezStream Booking Engine 3.0 > Verify Configuration Data.***

## *Amenities*

Amenities help describe units and were previously added to the RezStream Booking Engine using the Account > Account Information > Amenities link. Now it's time to assign amenities to units for the following reasons.

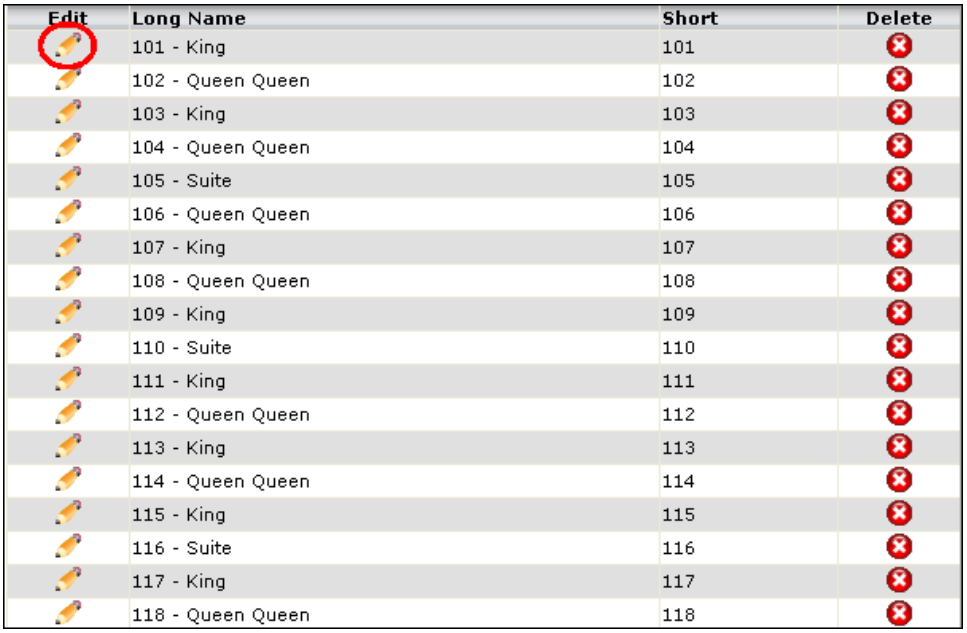
1. Amenities help describe the unit to assist Internet guests in determining which available room meets their needs.

2. Amenities assigned to a unit are initially flagged as "searchable," which helps Internet guests find rooms that meet their specific needs. Later on, amenities that you do NOT want flagged as searchable can be switched off using the steps described in the section titled, ***Amenity Searchability***.

Use the following steps for assigning amenities to a unit and flagging them as searchable.

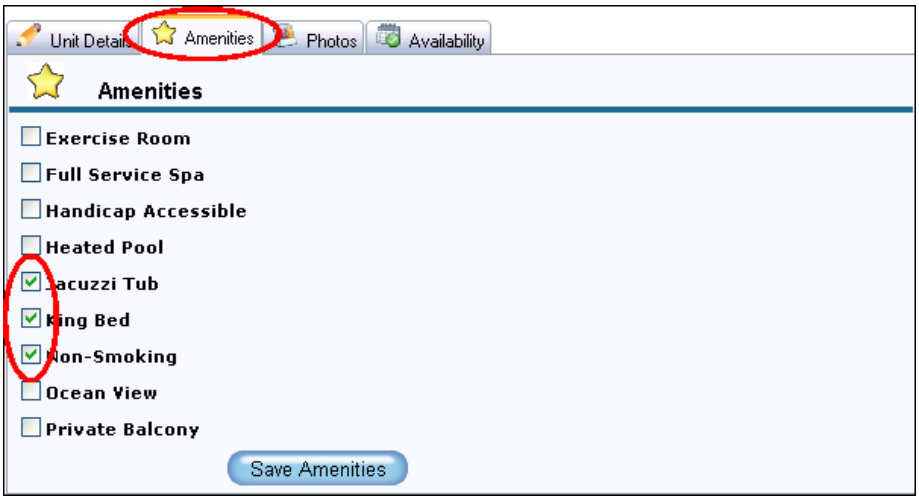
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Units/Rooms > Administration link.

2. A list of units is displayed. Click the edit icon ( ) associated with a specific unit. In this example, we will specify amenities for room 101 - King.

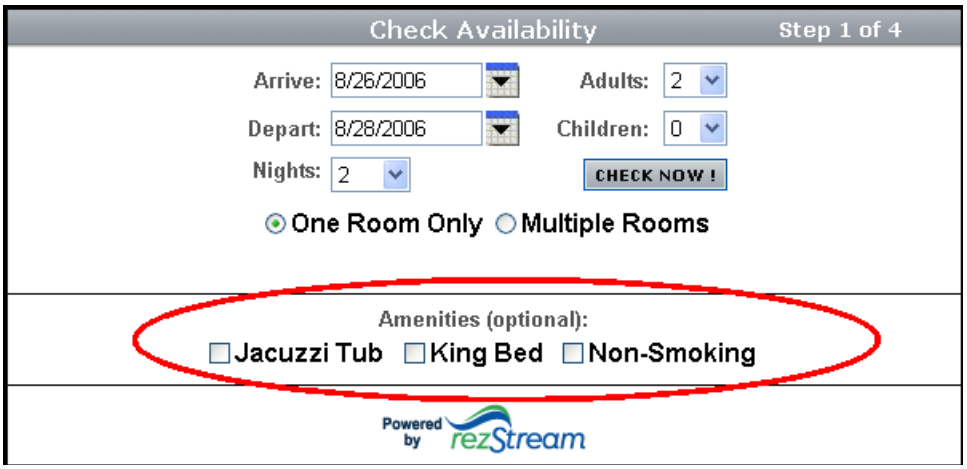


| Edit | Long Name | Short | Delete |
|---|---|---|---|
| | 101 - King | 101 | |
| | 102 - Queen Queen | 102 | |
| | 103 - King | 103 | |
| | 104 - Queen Queen | 104 | |
| | 105 - Suite | 105 | |
| | 106 - Queen Queen | 106 | |
| | 107 - King | 107 | |
| | 108 - Queen Queen | 108 | |
| | 109 - King | 109 | |
| | 110 - Suite | 110 | |
| | 111 - King | 111 | |
| | 112 - Queen Queen | 112 | |
| | 113 - King | 113 | |
| | 114 - Queen Queen | 114 | |
| | 115 - King | 115 | |
| | 116 - Suite | 116 | |
| | 117 - King | 117 | |
| | 118 - Queen Queen | 118 | |

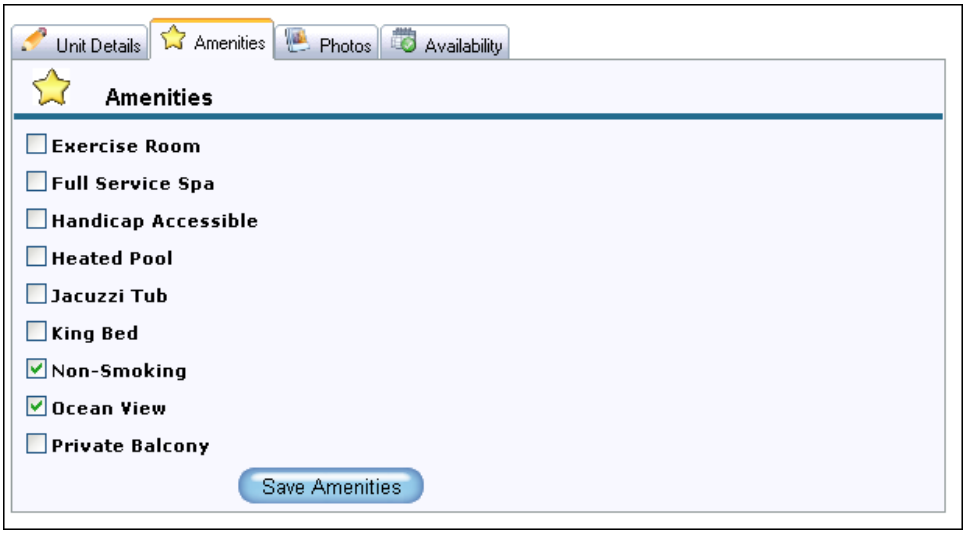
3. Click the Amenities tab.




4. Enter a checkmark next to the amenities that describe the selected room 101 - King. Entering a checkmark next to the amenity also flags it initially as searchable. In our example above, Jacuzzi Tub, King Bed, and Non-Smoking are now searchable amenities. The Check Availability screen will allow a potential guest to search for rooms with these amenities.



5. Next, in our example, we will continue to room 102 – Queen Queen and assign the amenities Non-Smoking and Ocean View.




6. The Check Availability form is automatically updated to include the amenity Ocean View as searchable.

***See the Property > Amenity Searchability section for information about making amenities non-searchable.***

## *Photos*

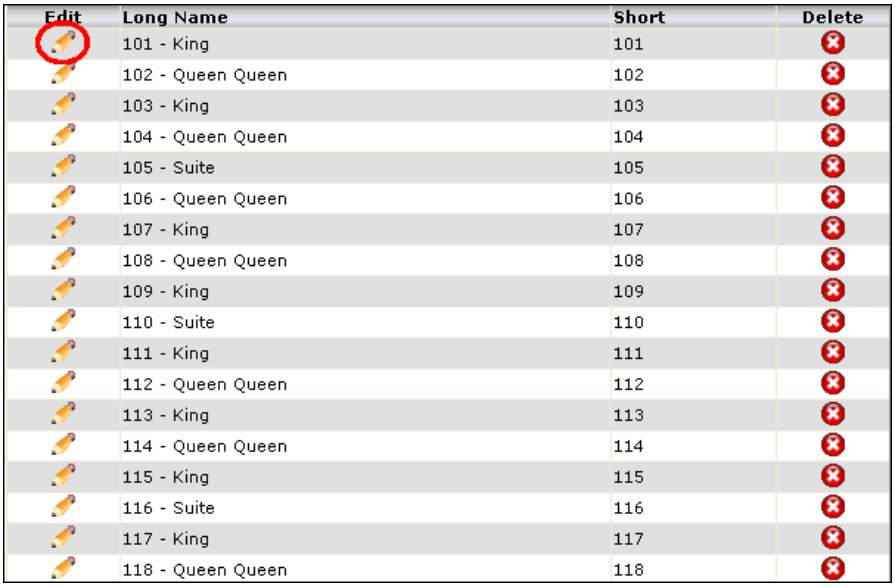
Photos help familiarize Internet guests with specific units. Photos/Images were previously added to the RezStream Booking Engine using Account > Account Information > Photos/Images/Media > Images link. When images were uploaded, they were assigned to one of four categories:

1. NoCategory
2. PropertyOnly
3. UnitOnly
4. PointofSaleOnly

When an image is uploaded to the UnitOnly category, use the following steps to assign it to a specific unit.

1. From the RezStream Booking Engine Online Administrative Interface, click Property > Units/Rooms > Administration.

2. A list of units is displayed. Click the edit icon ( ) associated with a specific room, in our example, 101 – King.



| Edit | Long Name | Short | Delete |
|---|---|---|---|
| | 101 - King | 101 | |
| | 102 - Queen Queen | 102 | |
| | 103 - King | 103 | |
| | 104 - Queen Queen | 104 | |
| | 105 - Suite | 105 | |
| | 106 - Queen Queen | 106 | |
| | 107 - King | 107 | |
| | 108 - Queen Queen | 108 | |
| | 109 - King | 109 | |
| | 110 - Suite | 110 | |
| | 111 - King | 111 | |
| | 112 - Queen Queen | 112 | |
| | 113 - King | 113 | |
| | 114 - Queen Queen | 114 | |
| | 115 - King | 115 | |
| | 116 - Suite | 116 | |
| | 117 - King | 117 | |
| | 118 - Queen Queen | 118 | |

3. Click the Photos tab.

4. Enter a checkmark next to the photo(s) that apply to the selected room (101 – King) and click the Save Unit Photos button.

***To disassociate a photo with a unit, remove the checkmark next to the photo description.***

## *Availability*

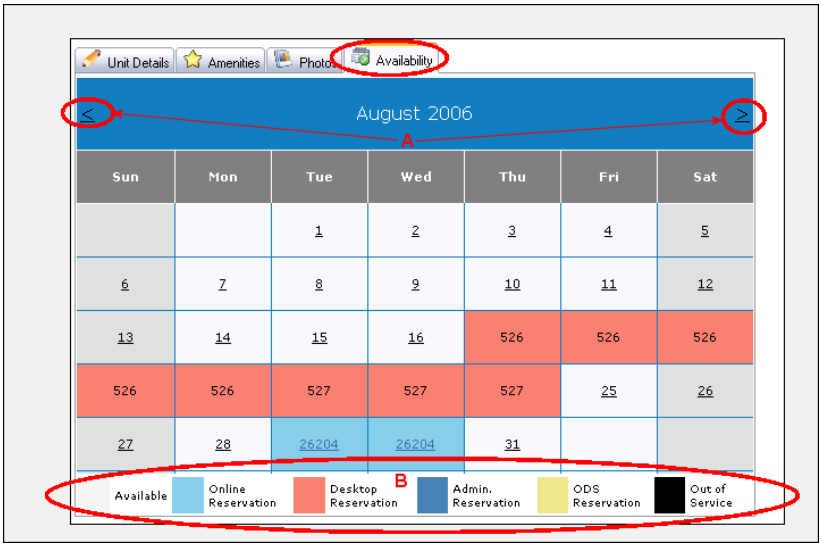
Availability for a specific room is also located on the RezStream Booking Engine Online Administrative Interface. Use the following steps to view single unit availability.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Units/Rooms > Administration link.

2. A list of units is displayed. Click the edit icon ( ) associated with a specific unit.

| Edit | Long Name | Short | Delete |
|---|---|---|---|
| | 101 - King | 101 | |
| | 102 - Queen Queen | 102 | |
| | 103 - King | 103 | |
| | 104 - Queen Queen | 104 | |
| | 105 - Suite | 105 | |
| | 106 - Queen Queen | 106 | |
| | 107 - King | 107 | |
| | 108 - Queen Queen | 108 | |
| | 109 - King | 109 | |
| | 110 - Suite | 110 | |
| | 111 - King | 111 | |
| | 112 - Queen Queen | 112 | |
| | 113 - King | 113 | |
| | 114 - Queen Queen | 114 | |
| | 115 - King | 115 | |
| | 116 - Suite | 116 | |
| | 117 - King | 117 | |
| | 118 - Queen Queen | 118 | |

3. Click the Availability tab. An availability calendar for the selected unit is displayed.
   A. Use the arrow keys at the top of the calendar to scroll months.
   B. The legend at the bottom of the availability calendar defines colors that are used to differentiate between reservation types.

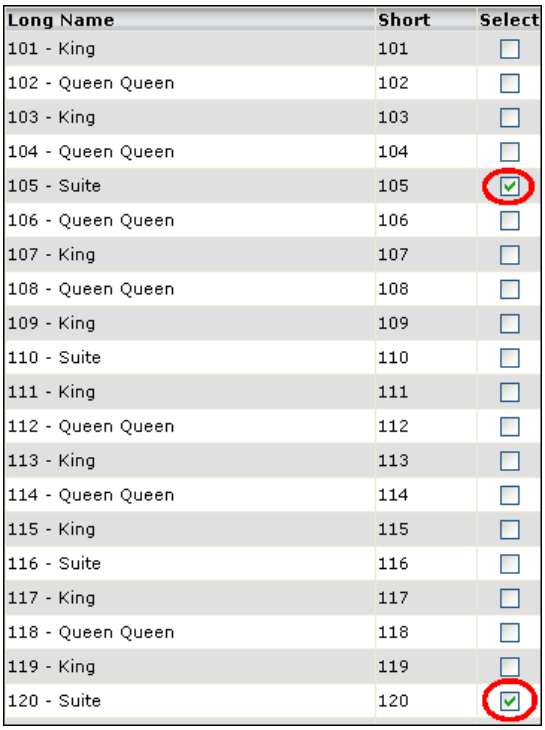


# BLACK-OUT WIZARD

Blackout dates make a unit unavailable to Internet guests searching for availability through the RezStream Booking Engine. Use the following steps for adding a blackout date.

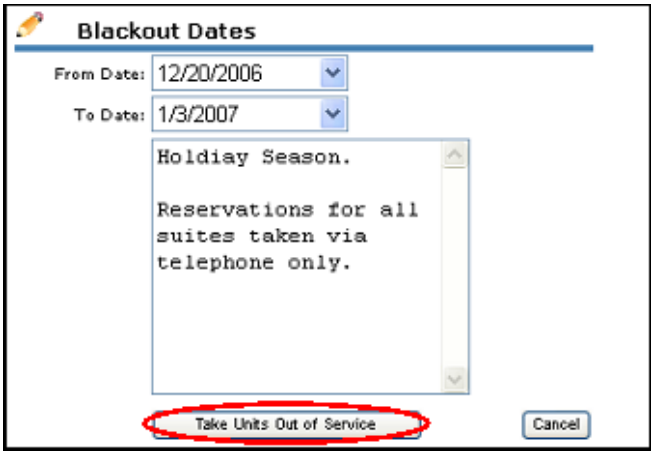
1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Units/Rooms > Black-Out Wizard link.

2. A table with a list of all units is displayed. Enter a checkmark in the "Select" checkbox that corresponds to units that will be affected by the blackout period.



| Long Name | Short | Select |
|---|---|---|
| 101 - King | 101 | ☐ |
| 102 - Queen Queen | 102 | ☐ |
| 103 - King | 103 | ☐ |
| 104 - Queen Queen | 104 | ☐ |
| 105 - Suite | 105 | ☑ |
| 106 - Queen Queen | 106 | ☐ |
| 107 - King | 107 | ☐ |
| 108 - Queen Queen | 108 | ☐ |
| 109 - King | 109 | ☐ |
| 110 - Suite | 110 | ☐ |
| 111 - King | 111 | ☐ |
| 112 - Queen Queen | 112 | ☐ |
| 113 - King | 113 | ☐ |
| 114 - Queen Queen | 114 | ☐ |
| 115 - King | 115 | ☐ |
| 116 - Suite | 116 | ☐ |
| 117 - King | 117 | ☐ |
| 118 - Queen Queen | 118 | ☐ |
| 119 - King | 119 | ☐ |
| 120 - Suite | 120 | ☑ |

3. Complete details in the Blackout Dates form located below the unit list. Enter the blackout starting date, ending date, and description that will be displayed to the online guest.




4. Click the Take Units Out of Service button.

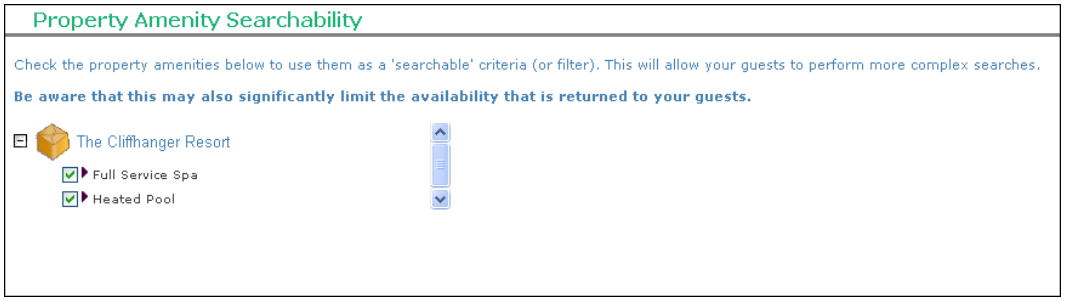
# AMENITY SEARCHABILITY

Amenities are assigned to properties using the Property > Property Information > Amenities link and assigned to Units using the Property > Units/Rooms > Administration link. As soon as an amenity is assigned to either a property or a unit, it automatically becomes searchable. Searchable amenities allow online guests to perform complex searches like searching for a property with a heated pool or a room with an ocean view.

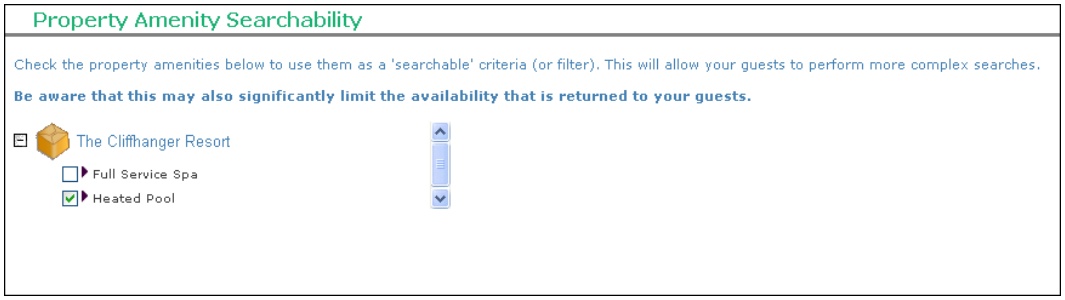
The Property > Amenity Searchability link displays all searchable amenities, by type, property, or unit. These links can also be used to remove the searchable flag for both property and unit level amenities.

## PROPERTY

Click the Property > Amenity Searchability > Property link to view property level amenities that have been flagged as searchable.

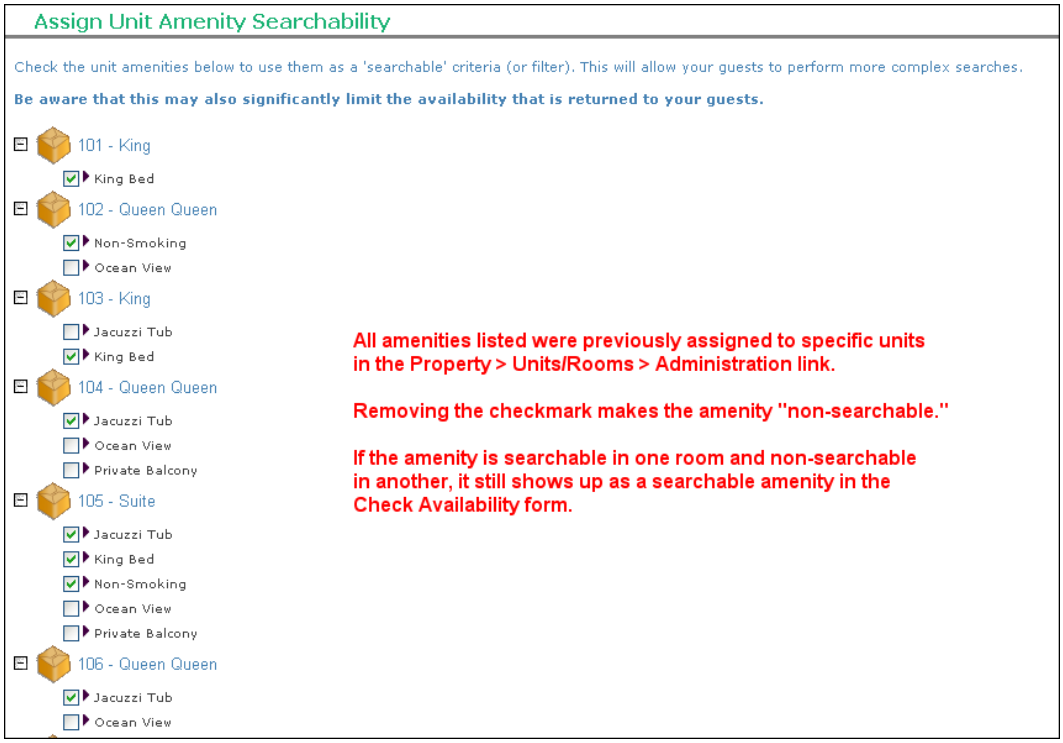

Property Amenity Searchability
Check the property amenities below to use them as a 'searchable' criteria (or filter). This will allow your guests to perform more complex searches.
Be aware that this may also significantly limit the availability that is returned to your guests.
The Cliffhanger Resort
Full Service Spa
Heated Pool

To remove the searchable flag, simply click the checkbox to the left of the amenity description. For example, if "Full Service Spa" should not be a searchable property amenity, remove the checkmark.

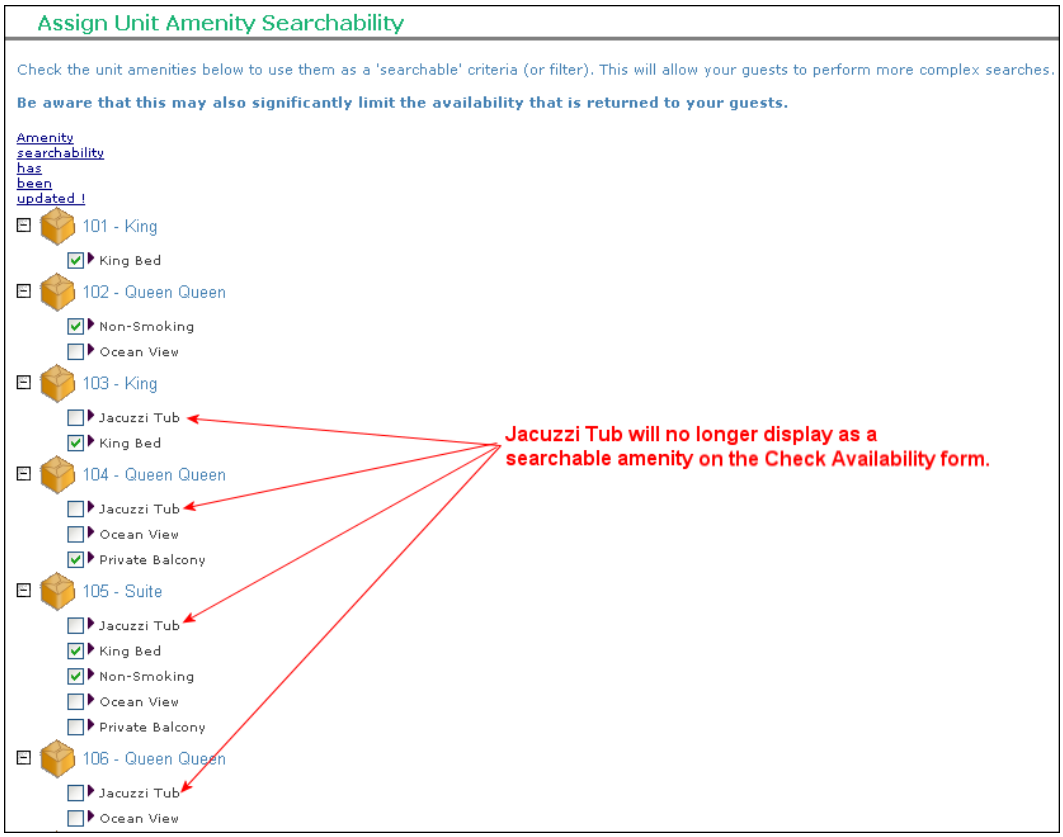

Property Amenity Searchability
Check the property amenities below to use them as a 'searchable' criteria (or filter). This will allow your guests to perform more complex searches.
Be aware that this may also significantly limit the availability that is returned to your guests.
The Cliffhanger Resort
Full Service Spa
Heated Pool

# UNIT/ROOM

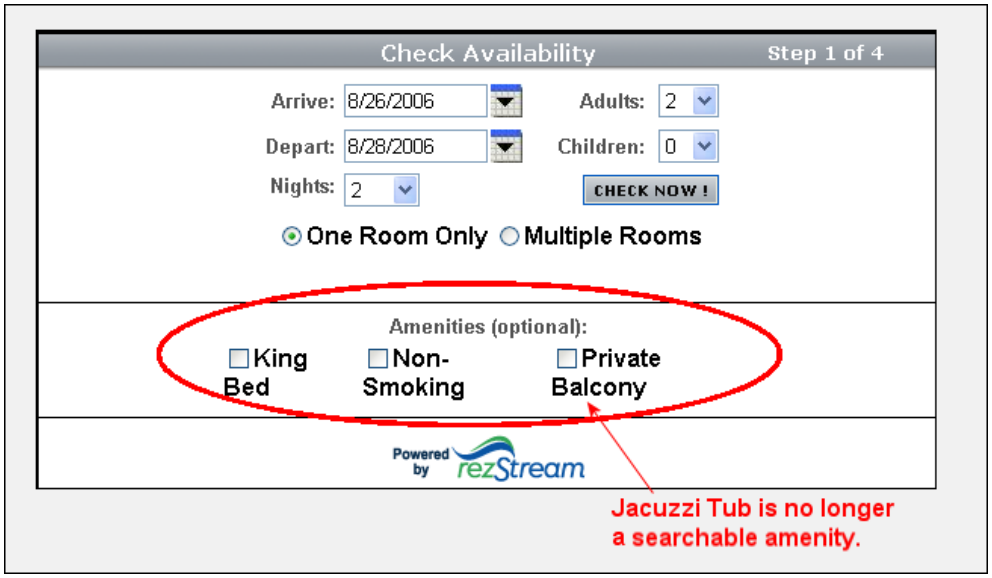
Click the Property > Amenity Searchability > Unit/Room link to view unit level amenities that have been flagged as searchable. Any amenity that has been assigned to a room is listed in the Assign Unit Amenity Searchability form.


Assign Unit Amenity Searchability
Check the unit amenities below to use them as a 'searchable' criteria (or filter). This will allow your guests to perform more complex searches.
Be aware that this may also significantly limit the availability that is returned to your guests.
101 - King
King Bed
102 - Queen Queen
Non-Smoking
Ocean View
103 - King
Jacuzzi Tub
King Bed
104 - Queen Queen
Jacuzzi Tub
Ocean View
Private Balcony
105 - Suite
Jacuzzi Tub
King Bed
Non-Smoking
Ocean View
Private Balcony
106 - Queen Queen
Jacuzzi Tub
Ocean View
All amenities listed were previously assigned to specific units in the Property > Units/Rooms > Administration link.
Removing the checkmark makes the amenity "non-searchable."
If the amenity is searchable in one room and non-searchable in another, it still shows up as a searchable amenity in the Check Availability form.

The amenities listed in the above form were assigned to units in the Property > Units/Rooms > Administration link. By default, amenities assigned to rooms are flagged as searchable. If you do NOT want a specific amenity to be searchable, de-select it in the Assign Unit Amenity Searchability form. For example, if you do NOT want the amenity "Jacuzzi Tub" to be searchable, remove the checkmark in the Assign Unit Amenity Searchability form.


Assign Unit Amenity Searchability
Check the unit amenities below to use them as a 'searchable' criteria (or filter). This will allow your guests to perform more complex searches.
Be aware that this may also significantly limit the availability that is returned to your guests.
Amenity searchability has been updated !
101 - King
King Bed
102 - Queen Queen
Non-Smoking
Ocean View
103 - King
Jacuzzi Tub
King Bed
104 - Queen Queen
Jacuzzi Tub
Ocean View
Private Balcony
105 - Suite
Jacuzzi Tub
King Bed
Non-Smoking
Ocean View
Private Balcony
106 - Queen Queen
Jacuzzi Tub
Ocean View
Jacuzzi Tub will no longer display as a searchable amenity on the Check Availability form.

By de-selecting Jacuzzi tub in the Assign Unit Amenity Searchability form, it no longer displays as a searchable amenity on the Check Availability form.




***In order for an amenity to be removed from the Check Availability form, it must be de-selected under every room on the Assign Unit Amenity Searchability form.***

# WEBSITE LINK OPTIONS

In order to make the RezStream Booking Engine "live," you will need to add a link to your property's marketing website that allows Internet guests to access the RezStream Booking Engine. Normally an Internet guest will visit your property's marketing website to learn about the property prior to booking a reservation. On the website, the Internet guest reads about the property, looks at property pictures, and becomes interested in making a reservation.

In order for the guest to book a reservation, a hyperlink is added to the website that redirects the Internet guest to the RezStream Booking Engine. This hyperlink can be text or a graphic that reads "Make a Reservation," "Book a Reservation," or anything else that lets the guest know that clicking the link will allow him to make a reservation. The link can be customized by the property and its web designer or one of the standard RezStream Booking Engine hyperlinks can be copied and pasted into the property's marketing website.

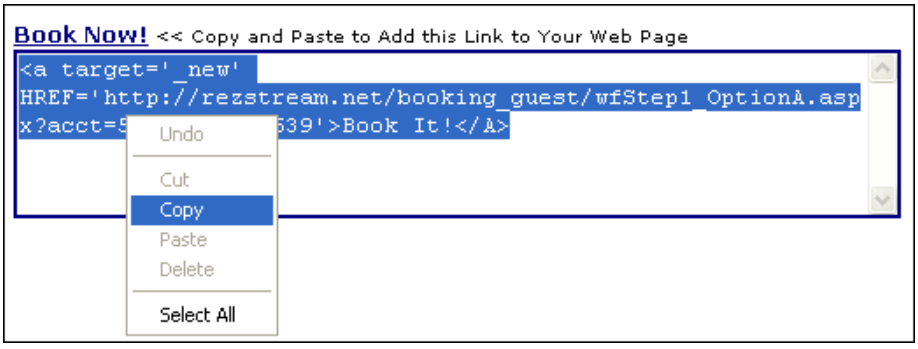
The standard options for linking to the RezStream Booking Engine are depicted in the following table.

| HYPERLINK OPTION | DESCRIPTION |
|---|---|
| ***Note: The hyperlink on your marketing website appears exactly as it does in this table.*** | |
| 1 | Book Now! |
| 2 | Reserve Now |
| 3 | Reserve |

Use the following steps to implement one of the standard "Make a Reservation" hyperlinks.

1. From the RezStream Booking Engine Online Administrative Interface, select Property > Website Link Options.

2. Highlight the HTML code associated with the desired link. After highlighting the desired code, right-click and select "Copy."

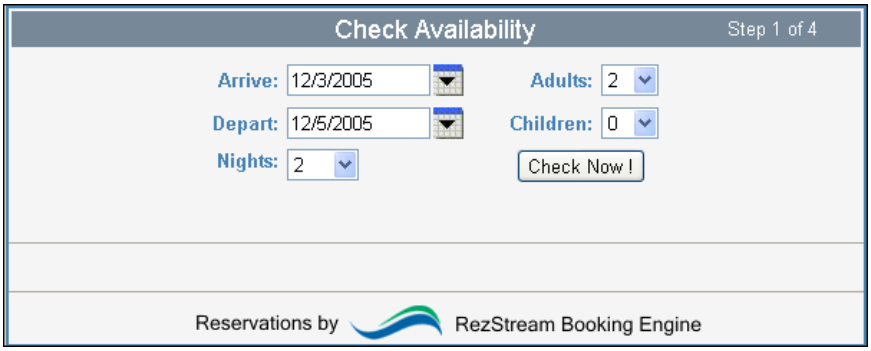



3. Right-click again to paste the HTML code into your property's marketing website.

***Note: If you do not maintain your own marketing website, steps 1-3 can be easily completed by the website design company that maintains your site.***

# WEBSITE AVAILABILITY CALENDARS

The default starting point for Internet guests to book online reservations via the RezStream Booking Engine is from the Check Availability form.




***If your property wants a guest to begin the online reservation process from the Check Availability form displayed above, there is no action item to complete in this section.***

Other calendar options are available under the Property > Website Availability Calendars link.

The Property > Website Availability Calendars link is divided into three sections:

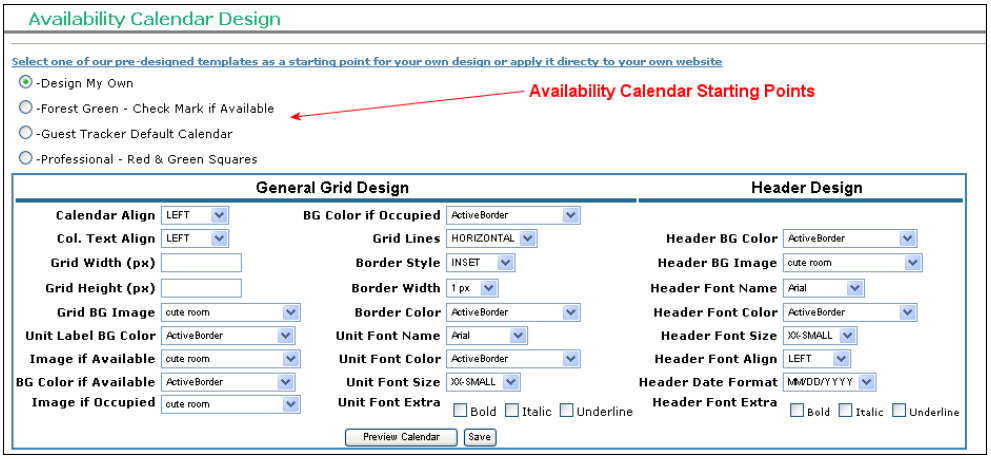
| | |
|---|---|
| **Design Customizable Calendar** | Use this link to create a customizable two-week grid availability calendar that will be displayed on your marketing website and used as a starting point for Internet guests to book online reservations. |
| **Retrieve Calendar Links** | After customizing your availability calendar, use this link to copy and paste the required HTML script to your property's marketing website. |
| **View Sample Calendars** | Click this link to view five sample calendars from an actual website. Have the ability to make bookings to see how each calendar works. |

## DESIGN CUSTOMIZABLE CALENDAR

Use the following steps to access the Availability Calendar Design form.

1. From the RezStream Booking Engine Online Administrative Interface, click the Property > Website Availability Calendars > Design Customizable Calendar link.

2. The Availability Calendar Design form is displayed. There are four radio buttons at the top of the form that can be used as starting points for designing an availability calendar.

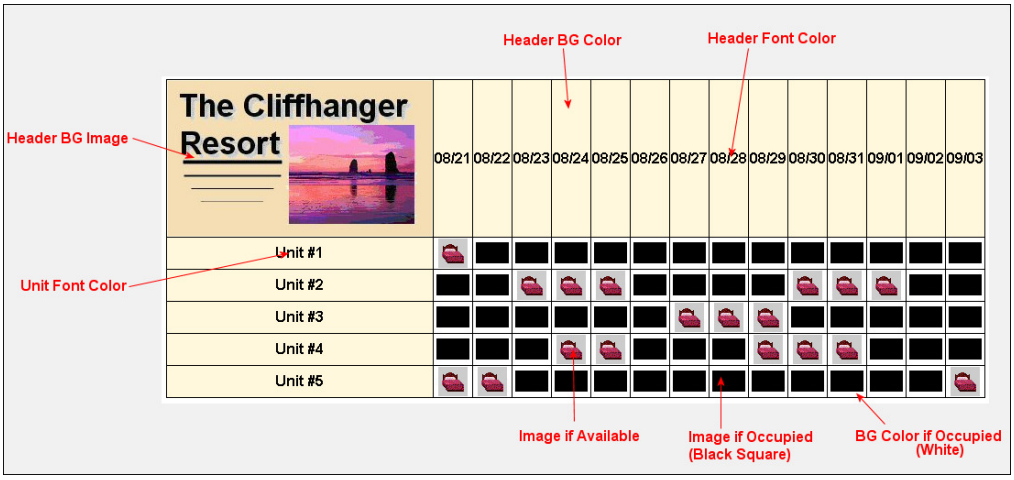



A sample and brief description of these four availability calendar styles is displayed below.

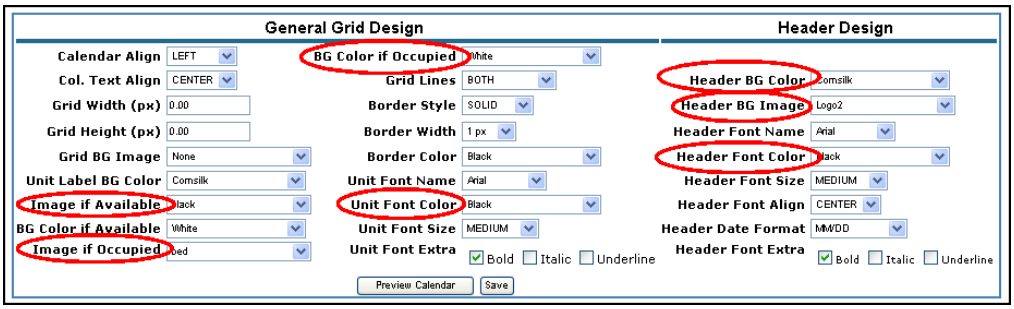
## *Design My Own*

The Design My Own option displays an availability calendar with default settings but it also allows you to customize the calendar to match the look and feel of your marketing website. A sample calendar is displayed below along with pointers that highlight settings that have been changed in our example.

***The abbreviation BG in the following images and in the General Grid/Grid Header Design table stands for background.***



The Availability Design Calendar form is displayed below completed in the manner that produces the sample Availability Calendar displayed above. Circled fields in this table correspond to the pointers in the image above.



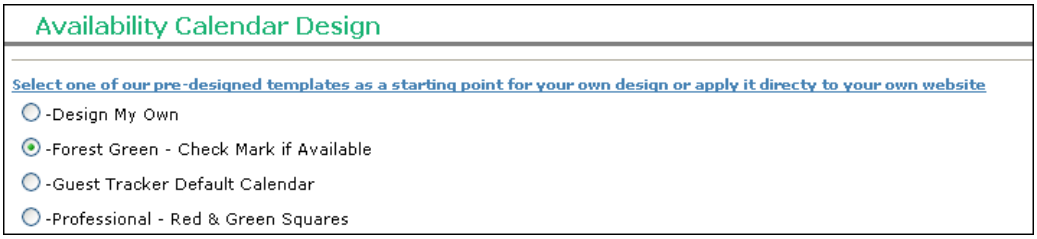

Notes about the General Grid Design fields listed above.

1. The fields "Image if Available" and "Image if Occupied" refer to images that display in the calendar if the room is available or occupied on a particular date.

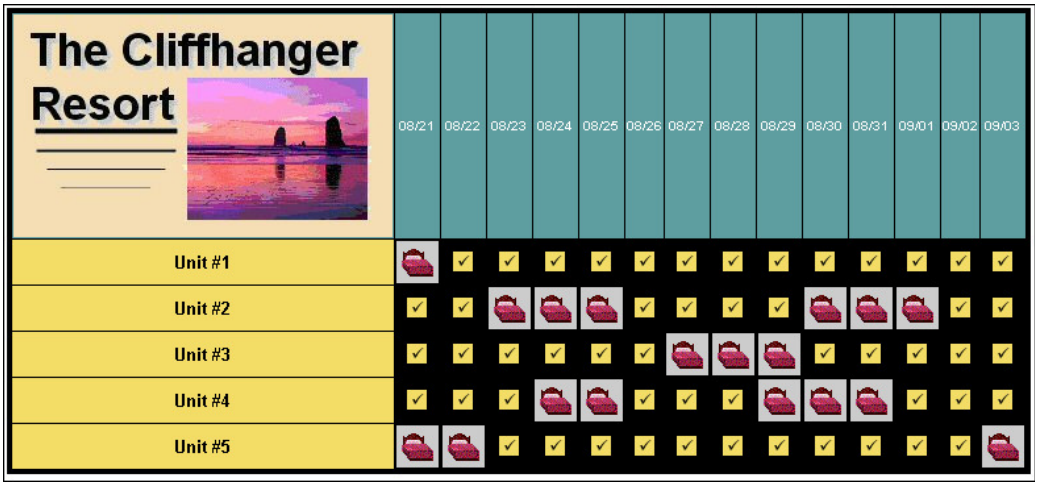
2. In addition to standard RezStream Booking Engine images, image fields (Grid BG Image and Header BG Image) can be populated with images that have been uploaded to the RezStream Booking Engine.

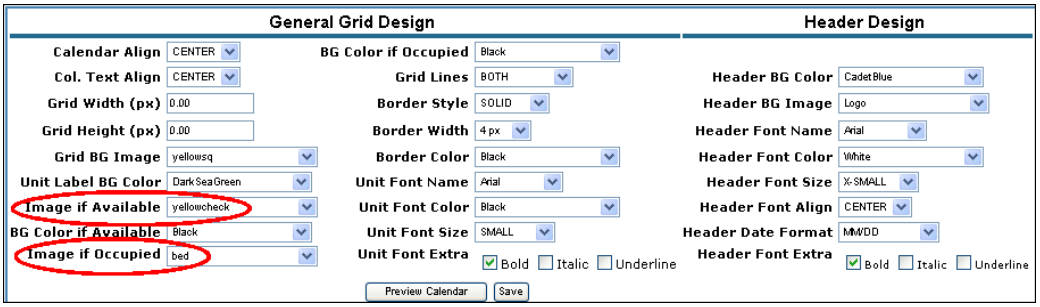
## *Forest Green – Checkmark if Available*

The Forest Green – Checkmark if Available calendar can be used as a starting point for designing your property's availability calendar.


Availability Calendar Design
Select one of our pre-designed templates as a starting point for your own design or apply it directy to your own website
-Design My Own
-Forest Green - Check Mark if Available
-Guest Tracker Default Calendar
-Professional - Red & Green Squares

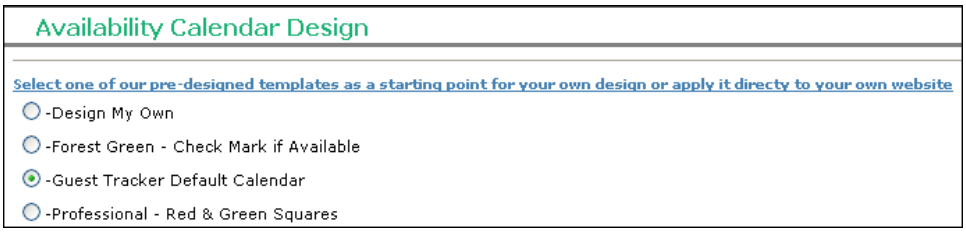
In this option, a yellow checkmark is displayed if a unit is available on a particular date. In our example below, the calendar has been customized to display a bed ( ) if the room is occupied. We have also customized the look of this calendar by adding our property's logo.






## *Guest Tracker Default Calendar*

The Guest Tracker Default Calendar is similar to the one used in the Guest Tracker Desktop software.

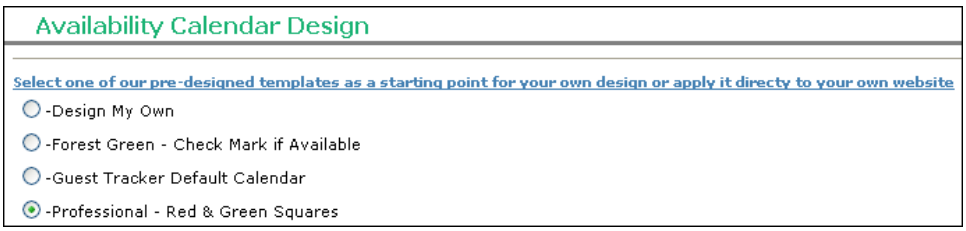

Availability Calendar Design
Select one of our pre-designed templates as a starting point for your own design or apply it directy to your own website
-Design My Own
-Forest Green - Check Mark if Available
-Guest Tracker Default Calendar
-Professional - Red & Green Squares

The word "book" is displayed in the grid when a unit is available while an 'X' denotes an occupied room.

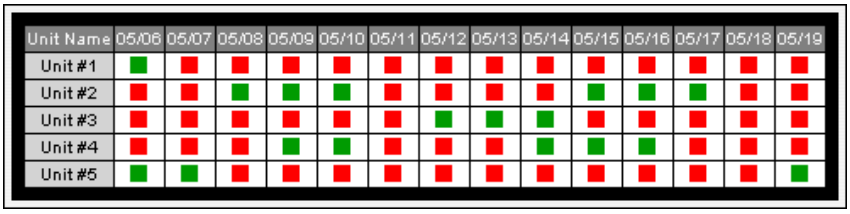
| Unit Name | 05/06 | 05/07 | 05/08 | 05/09 | 05/10 | 05/11 | 05/12 | 05/13 | 05/14 | 05/15 | 05/16 | 05/17 | 05/18 | 05/19 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Unit #1 | book | X | X | X | X | X | X | X | X | X | X | X | X | X |
| Unit #2 | X | X | book | book | book | X | X | X | X | book | book | book | X | X |
| Unit #3 | X | X | X | X | X | X | book | book | book | X | X | X | X | X |
| Unit #4 | X | X | X | book | book | X | X | X | book | book | book | X | X | X |
| Unit #5 | book | book | X | X | X | X | X | X | X | X | X | X | X | book |

## *Professional – Red & Green Squares*

The Professional – Red & Green Squares calendar can also be used as a starting point for designing your availability calendar.


Availability Calendar Design
Select one of our pre-designed templates as a starting point for your own design or apply it directy to your own website
-Design My Own
-Forest Green - Check Mark if Available
-Guest Tracker Default Calendar
-Professional - Red & Green Squares

The red and green squares in the grid signify whether rooms are booked (red) or available (green).

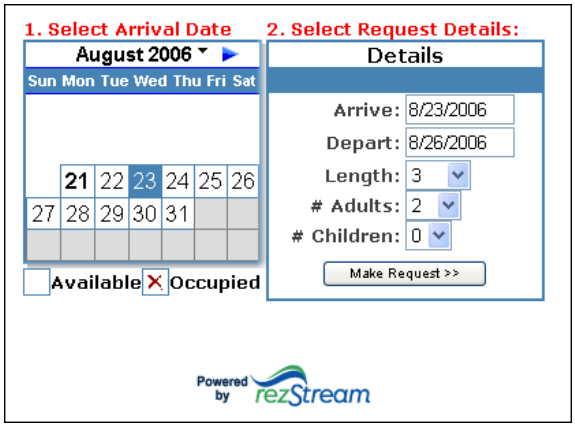



## RETRIEVE CALENDAR LINKS

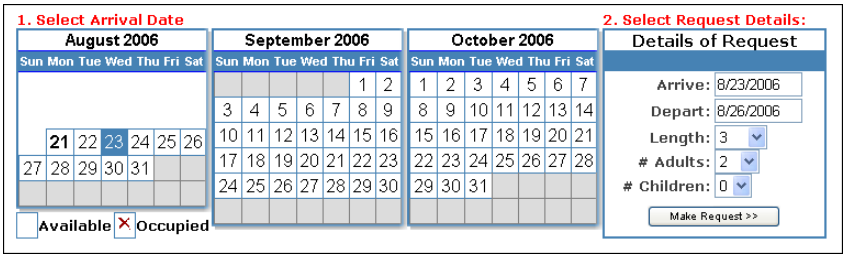
Once you have decided which calendar type to use, there are five options for display. An example of each is displayed below.

**PROPERTY AVAILABILITY CALENDAR OPTIONS**

**Single Month Scrollable**

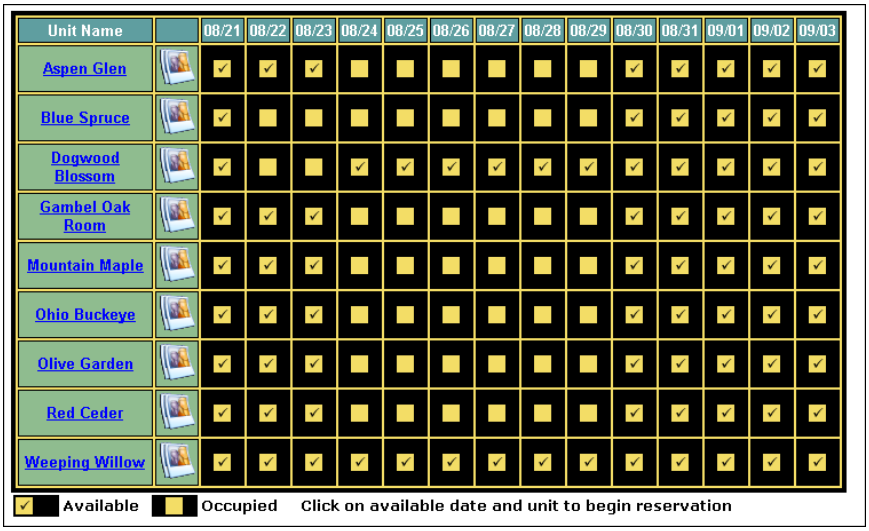



**Three Month Scrollable**



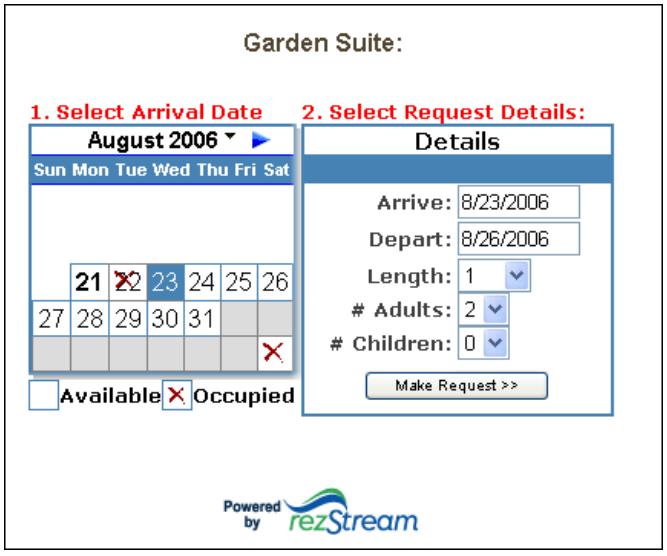
## PROPERTY AVAILABILITY CALENDAR OPTIONS

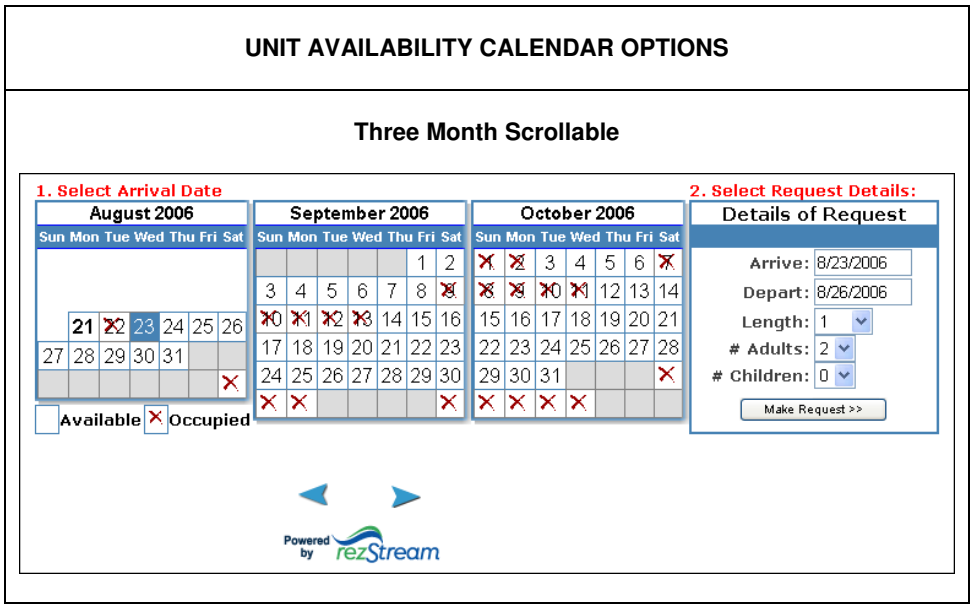
### Customizable Unit Grid




## UNIT AVAILABILITY CALENDAR OPTIONS

### Single Month Scrollable



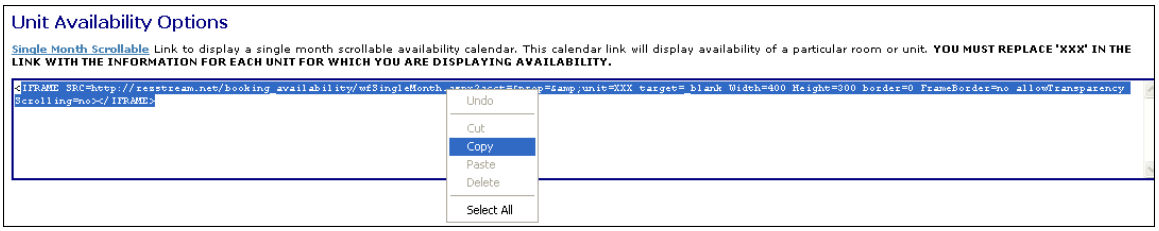



Use the following steps to add an availability calendar format to your marketing website.

1. Decide whether you want to display a "Property" calendar or a "Unit" calendar. Property calendars display availability for the property as a whole. If one room is available, the calendar displays the date as available. Unit calendars display availability for specific individual units.

2. From the RezStream Booking Engine Online Administrative Interface, select the Property > Website Availability Calendars > Retrieve Calendar Links.

3. The five HTML options displayed in the availability calendar links form correspond directly to the five calendar examples displayed above. Choose from the three property availability options or the two unit availability options.

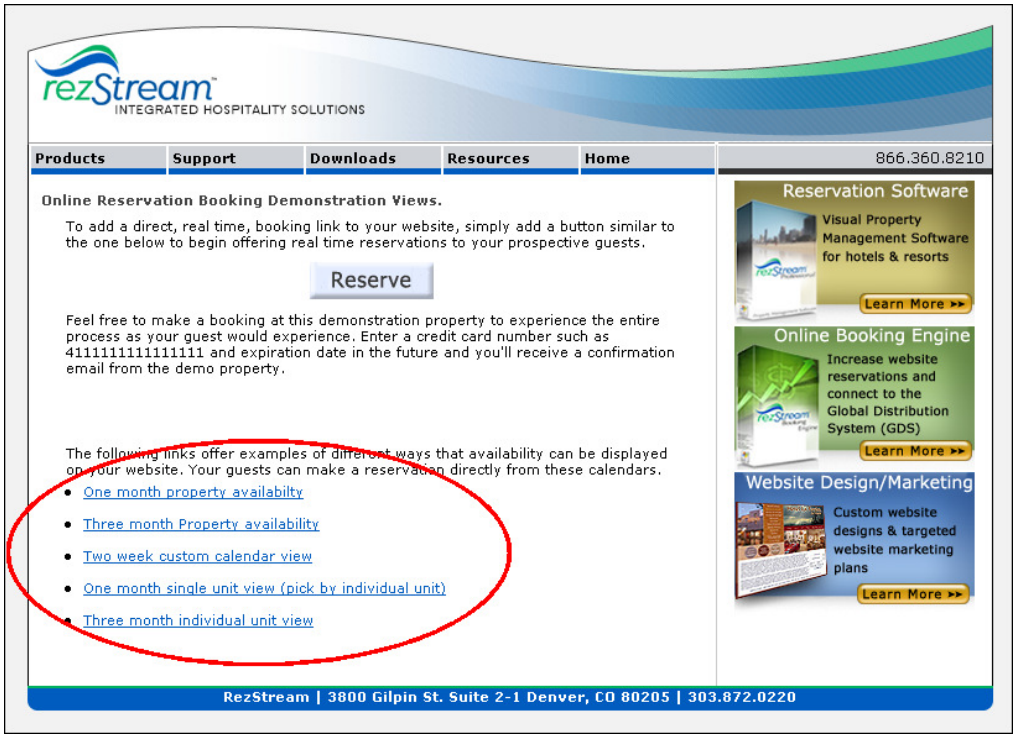

Unit Availability Options
Single Month Scrollable Link to display a single month scrollable availability calendar. This calendar link will display availability of a particular room or unit. YOU MUST REPLACE 'XXX' IN THE LINK WITH THE INFORMATION FOR EACH UNIT FOR WHICH YOU ARE DISPLAYING AVAILABILITY.
Undo
Cut
Copy
Paste
Delete
Select All

4. Copy and paste the HTML for the availability calendar link that you have selected to the appropriate location on your property's marketing website.

***Note: If you do not maintain your own marketing website, the process of copying the above HTML to your property's website can be easily completed by the website design company that maintains your site.***

# AVAILABILITY EXAMPLES

Click the Property > Website Availability Calendars > Availability Examples link to visit the RezStream website where you can view examples of each calendar type.


rezStream
INTEGRATED HOSPITALITY SOLUTIONS
Products
Support
Downloads
Resources
Home
866.360.8210
Online Reservation Booking Demonstration Views.
To add a direct, real time, booking link to your website, simply add a button similar to the one below to begin offering real time reservations to your prospective guests.
Reserve
Feel free to make a booking at this demonstration property to experience the entire process as your guest would experience. Enter a credit card number such as 4111111111111111 and expiration date in the future and you'll receive a confirmation email from the demo property.
The following links offer examples of different ways that availability can be displayed on your website. Your guests can make a reservation directly from these calendars.
One month property availabilty
Three month Property availability
Two week custom calendar view
One month single unit view (pick by individual unit)
Three month individual unit view
Reservation Software
Visual Property Management Software for hotels & resorts
Learn More
Online Booking Engine
Increase website reservations and connect to the Global Distribution System (GDS)
Learn More
Website Design/Marketing
Custom website designs & targeted website marketing plans
Learn More
RezStream | 3800 Gilpin St. Suite 2-1 Denver, CO 80205 | 303.872.0220

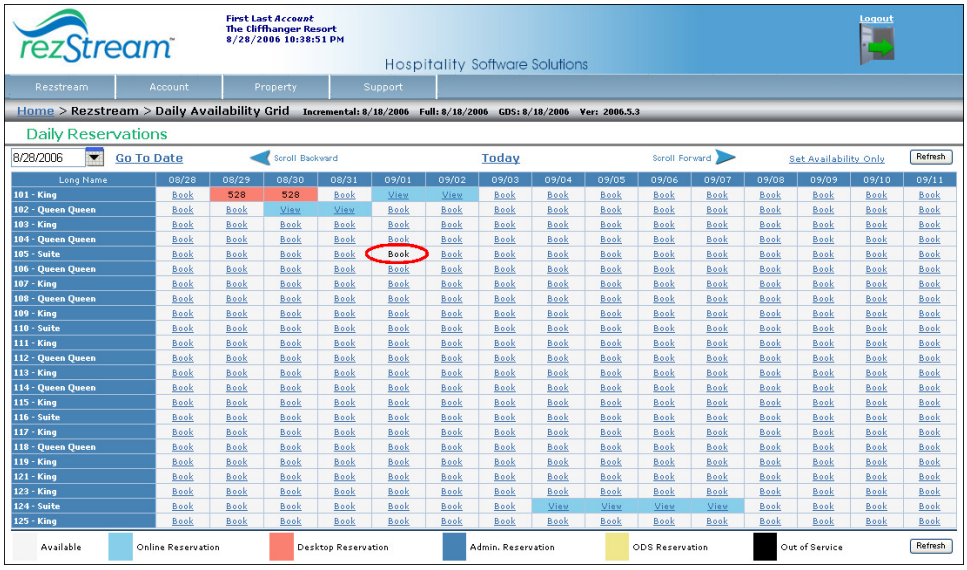
# ADMINISTRATIVE RESERVATIONS

Administrative reservations are another method for making reservations and can be made by users with access to the RezStream Booking Engine Online Administrative Interface.

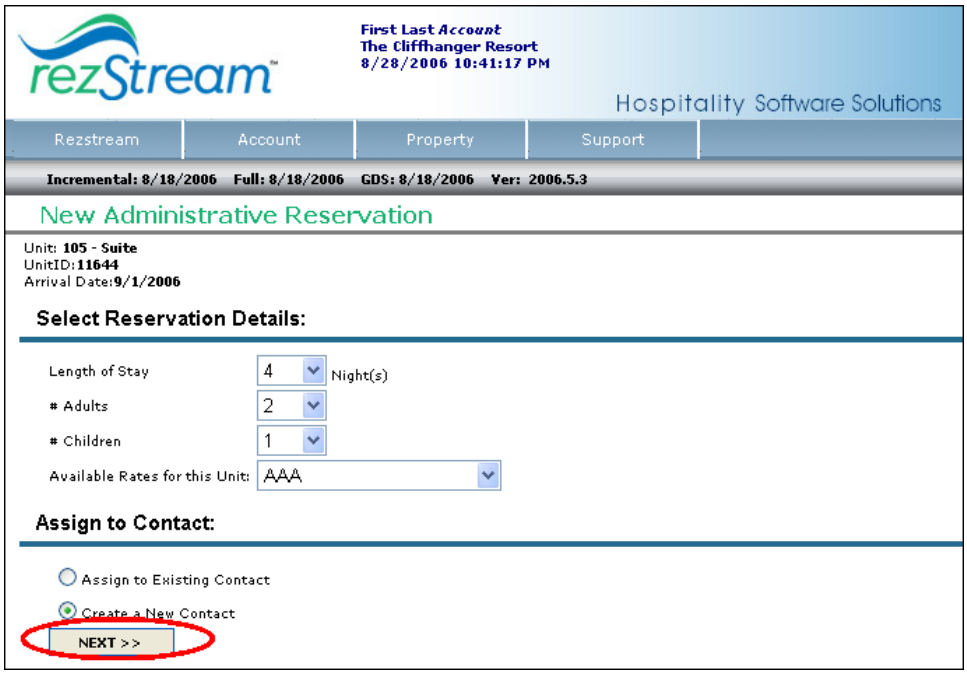
For example, assume a property's front office manager is making configuration changes to the RezStream Booking Engine from the Online Administrative Interface and simultaneously takes a reservation phone call. Instead of logging out of the RezStream Booking Engine Online Administrative Interface and logging into RezStream Professional, the front office manager could simply make the reservation online. This administrative reservation would then be transferred back into RezStream Professional as part of the online availability update.

Use the following steps for making an administrative reservation from the RezStream Booking Engine Online Administrative Interface.

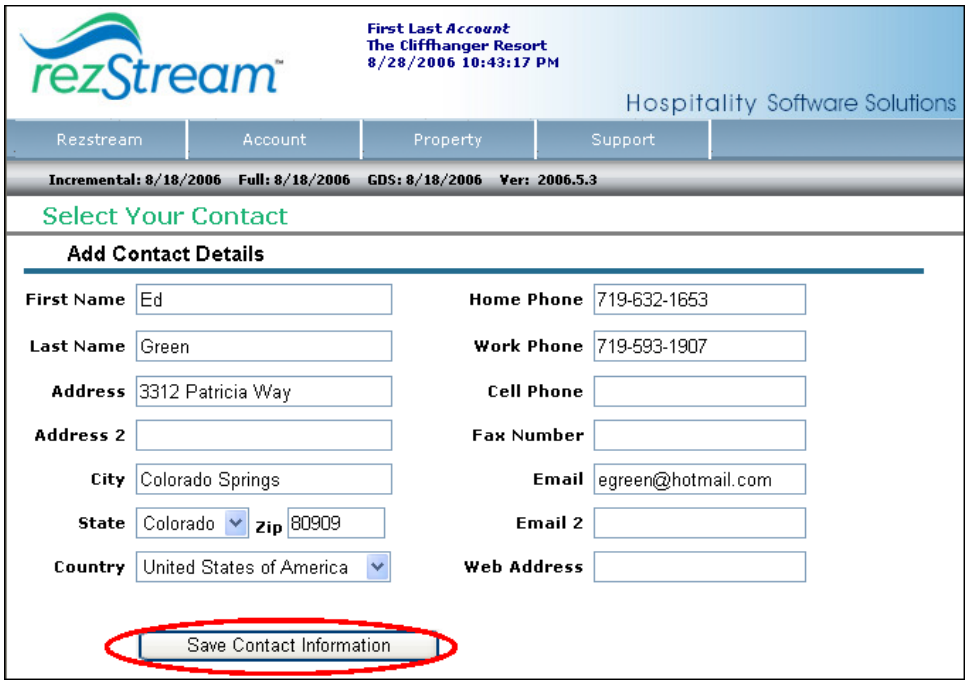
1. From the RezStream Booking Engine Daily Reservations availability calendar, click on the desired arrival date.



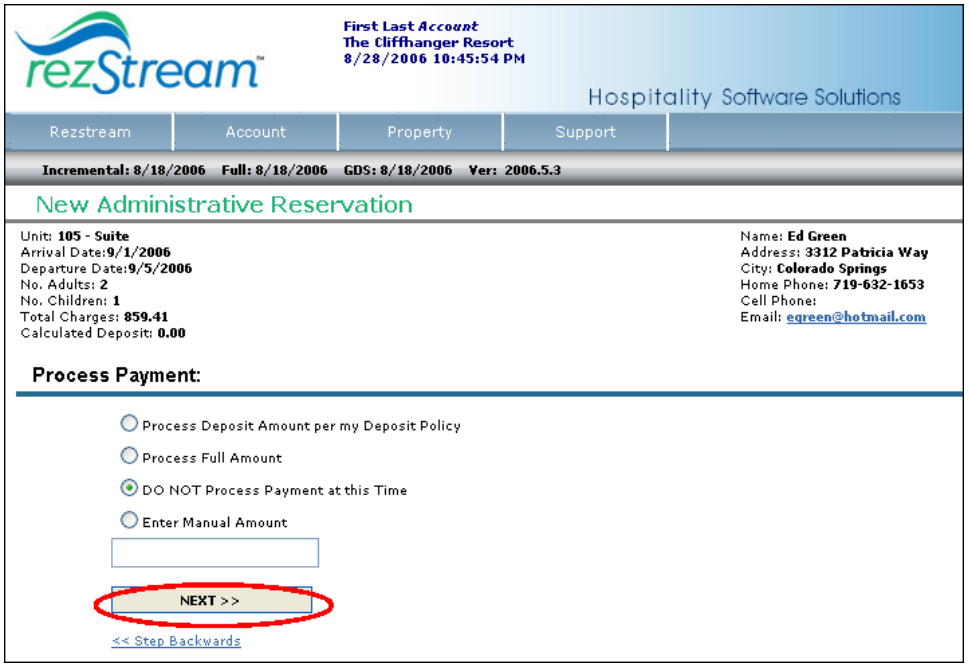
2. Complete the New Administrative Reservation form details and click the Next button.



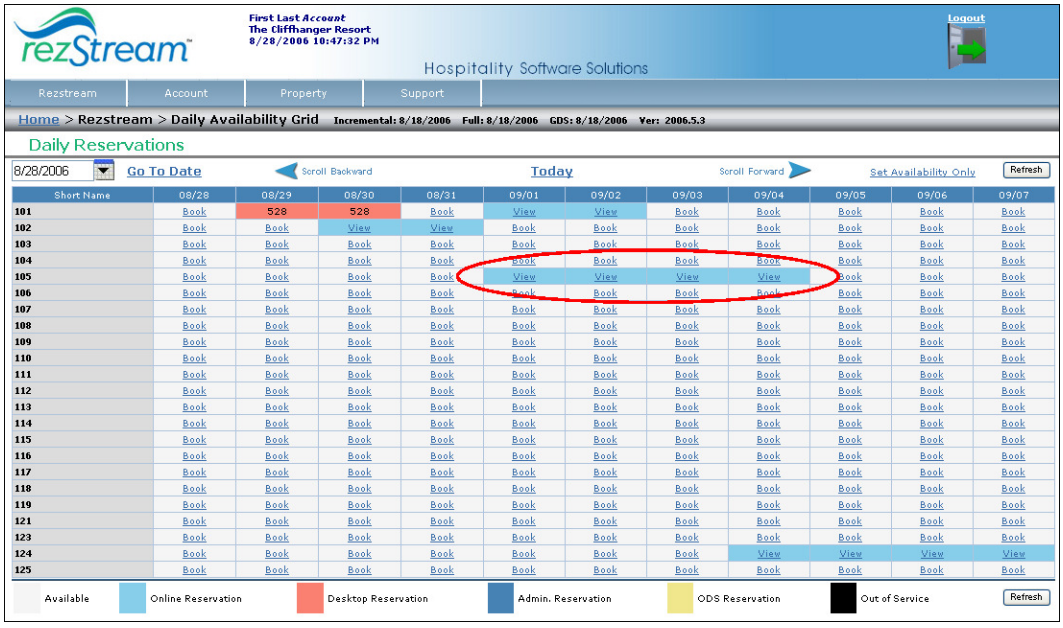
3. Complete the Add Contact Details form and click the Save Contact Information button.



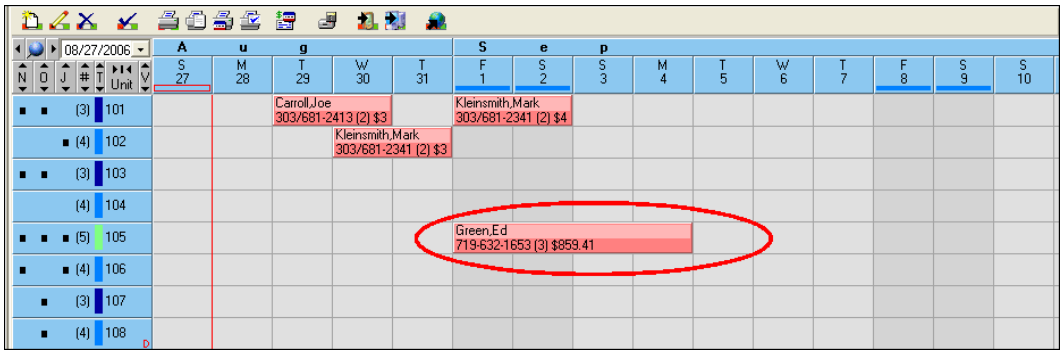

4. Complete the Process Payment form and click the Next button.



5. The reservation is now displayed on the Daily Reservations calendar in the RezStream Booking Engine Online Administrative Interface.




The reservation is also transferred to RezStream Professional and displayed on the Daily screen.



# REZSTREAM CONTACT INFORMATION

For additional information on any of the topics contained in this RezStream Professional Booking Engine User's Guide, please contact:

RezStream Help Desk
303-872-0220

Please contact RezStream sales at 866-360-8210 for information on RezStream add-on modules, including:

- Credit Card Processing
- Property Management
- Global Distribution System

Normal business hours are 8AM to 5PM, Monday through Friday, MST.

After hours support is available for an additional fee.

Please note RezStream's contact information:

RezStream, Inc.
3800 Gilpin Street, Suite 2-1
Denver, CO 80205
Sales: 866-360-8210
Support: 303-872-0220
Fax: 303-297-3233
www.rezstream.com
sales@rezstream.com
support@rezstream.com

# REZSTREAM ADDITIONAL REFERENCES

Documents available for download on the documentation download page.

**RezStream Professional:**

http://www.rezstream.com/documentation_rezstream_professional.htm

- RezStream Professional Front Desk Guide
- RezStream Professional User's Manual
- RezStream Property Management Module User's Guide
- RezStream Professional Credit Card Processing Manual

**RezStream Booking Engine:**

http://www.rezstream.com/documentation_rezstream_booking_engine.htm

- RezStream Booking Engine User's Guide (for Standalone Users)
- RezStream Booking Engine Quick Start Guide
- RezStream Booking Engine Payment Gateway Configuration

RezStream also offers training demos on a variety of topics accessed from the following web page.

http://rezstream.com/software_demos.htm